



Journey Mapping for Change – August 2019

Introductions



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The Journey

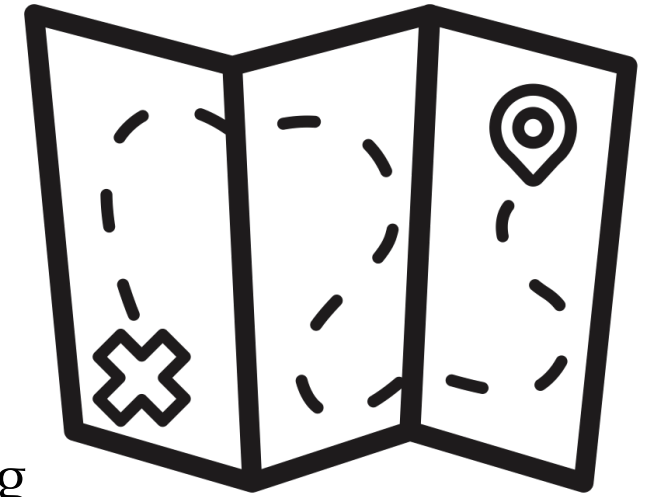


**Success is not a destination,
it's a journey**

-Zig Zigler

Journey Mapping

- Concept Overview
- Journey Map Components
- Important Steps for Journey Mapping
- Examples
- Journey Maps & Strategic Planning
- Journey Maps & Employee Experience





Concept Overview

The What, the Why and the What it is Not

What is a Journey Map?

- A customer journey map is a visualization of the process that a customer experiences in order to accomplish a goal or satisfy a need.
 - **Overall Journey** – Describes the customer’s broader experience – not just the agency’s ‘process steps’
 - **Typical Persona** – Represents the typical experience for a category of customer – a ‘persona’
 - **Emotions & Challenges** – Designed to provide insight into the customer’s challenges, emotions, and motivations



Why a Journey Map? Customer Experience!

- A journey map focuses the agency's thinking on the customer's overall experience...
 - **Motivation** – Where are they “coming from”?
 - **Challenges** – What questions, confusion, or misconceptions do they have?
 - **Gaps** – Are there gaps in the “journey” that are disjointed or painful?
 - **Innovation** – Is the current experience outdated compared to ‘digital life’ expectations in our modern world?

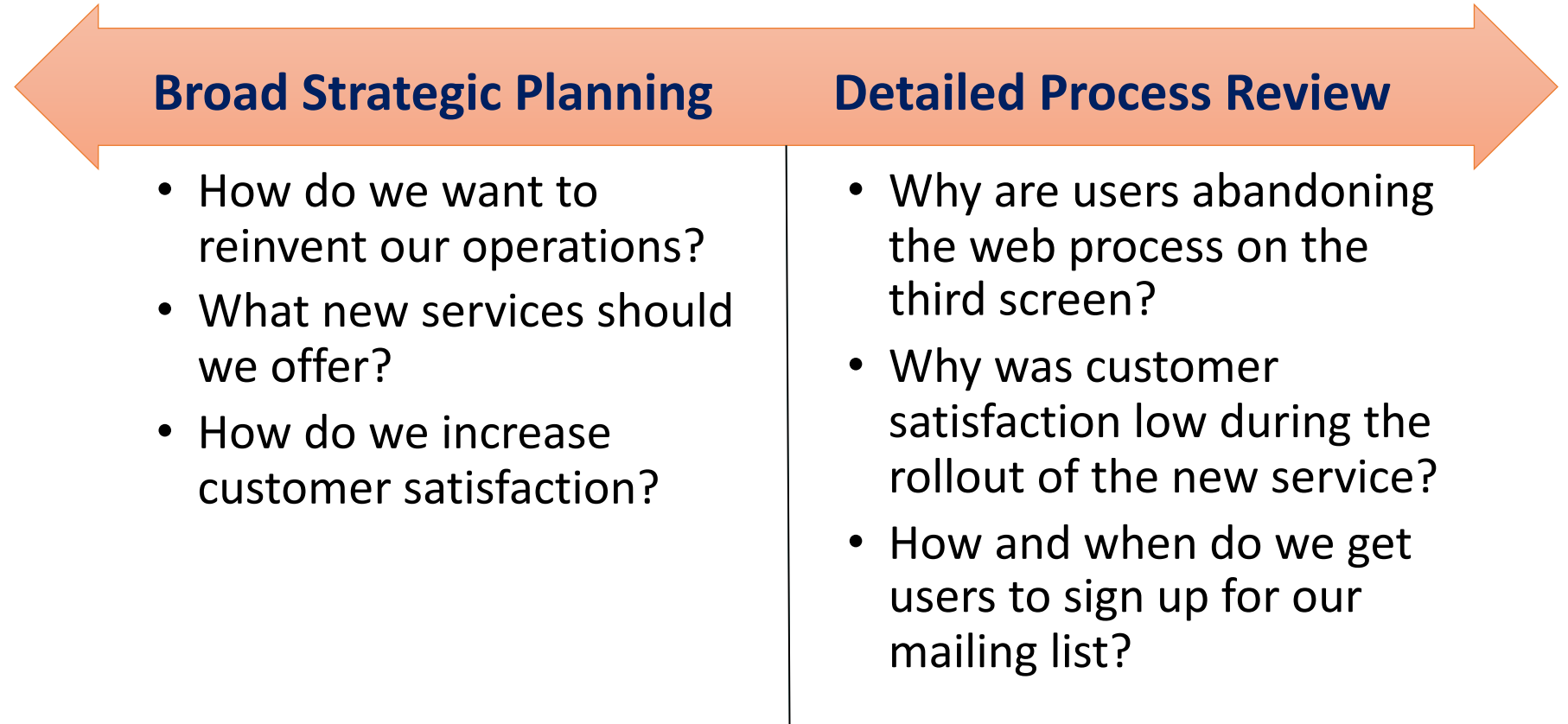


What a Journey Map is Not

- It's more “artist's rendition” than “detailed blueprint.”
- A journey map is not representative of every detail of the customer's experience or the business process.
 - Not detailed process steps as compared to process flows or swim lane diagrams
 - Focuses on tasks and questions
 - Not Everyone or All Challenges
 - Can't consolidate all personas,
all paths and
all challenges into a single journey map.

Journey Maps – Range of Use

Journey maps are a tool that can be applied in many planning activities.





Journey Map Components







Common Elements of a Journey Map



Components of a Journey Map – Married Filing Separate PY

Tom, 28 Best Buy Salesman just married

Tom is a Maryland taxpayer whose new spouse moved into the state part way through the year and wants to know how they should file.

	Awareness	Education	Preparation	Transaction	Support	
Customer Activity	Tom is told they may want to file separate.	Tom researches filing married but separate.	Tom decides to get an accountant to do his taxes.	Visits field office. 15min wait + 30 min transaction.	Calls to see when refund will arrive.	
Mindset	Confused, Annoyed, Who has the answer?	Many options for documentation? Are they correct?	Feels like spending extra money.	Line not too long. Facility easy to find.	Annoyed it is late, Happy call center could track status.	
Touchpoints	Just married and spouse just moved to Maryland.	Website, Call Center, Field Office	Website, Call Center, H&R Block	Field Office	Call Center, Field Office	
Emotions						
Opportunities	Better customer awareness – more channels.	Simpler info on website. More training call staff.	Better support for obtaining documentation.	Reduce time in the field office.	Provide proactive notifications and on-line lookup.	



Important Steps for Journey Mapping

Use a process that gets good data...

Step 1 – Research

- Research is critical for obtaining the information necessary to understand the customer's journey.
 - Confirm the Scope & Purpose
 - Persona
 - Journey Paths
 - Objective
 - Collect Analytical Data
 - Web Site Analytics
 - Process Metrics
 - Collect Anecdotal Information
 - Customer Interviews
 - Customer Feedback
 - Service Agent Insight



Step 2 – Building the Journey Map

- Journey Maps shouldn't be drawn in isolation. They are the product of a group collaborative experience.
 - Organize Team
 - Sr. Leadership, Managers, Customer Service Agents
 - Convene Workshop
 - Whiteboards, sticky note, projectors, and space to work
 - Refine Scope
 - Focus on the breadth of the customer journey – not just the business process
 - Define Phases
 - Awareness – Education – Preparation – Transaction – Support (or whatever works)
 - Refine Goals & Framework
 - Structure the process and graphical map to include necessary info
 - Focus on Primary Paths
 - Tangent paths can become confusing



Step 3 – Confirm Accuracy & Act!

- Of course, these efforts go to waste if they are not carefully used to move forward.
 - Cleanup
 - Make sure the final product is consistent and looking good
 - Confirm Accuracy
 - Distribute the draft to mapping team and their staff
 - Collect comments
 - Update & repeat
 - Act On The New Insight!
 - Identify system changes
 - Identify process changes
 - Identify communication changes



What Are We Looking For in Journey Maps?

How's My Driving?
Call: 888-555-5555

- How can we improve the customer's digital government experience?
 - Understand Sources of Frustration
 - Lack of information
 - Tasks that add minimal value
 - Use of personal time to complete "paperwork" and wait for service
 - Meet Customer Needs For Service And Information
 - Provide the right level of info at the right time
 - Identify new services
 - Find Opportunities to Engage and Assist
 - Strategy for newsletter and notice sign-up
 - Best channels to educate
 - Close Gaps in Service or Handoffs Across Processes
 - Enable all channels to complete as much work as possible

How Do We Improve Performance In the Digital Age?



- How do we support the customer and...
 - Awareness
 - Make them aware of available services and obligations?
 - Education
 - Become even easier to do business with?
 - Engage & communicate with potential and existing customers?
 - Educate for different levels of education and experience?
 - Transaction
 - Simplify the steps and rules?
 - How do reduce paperwork and redundant information?
 - How do we proactively assist the customer?
 - Collaborate with other agencies?
 - Support
 - How do we track progress and notify the customer?

Journey Map Examples











A Picture is Worth a Thousand Words



“If Alan Greenspan can tell Congress that he might very well have been wrong about basic economic principles for the past forty years, why can’t you admit we’ve been lost for the last twenty minutes?”

Tom, 28, Best
Buy Salesman,
Getting married

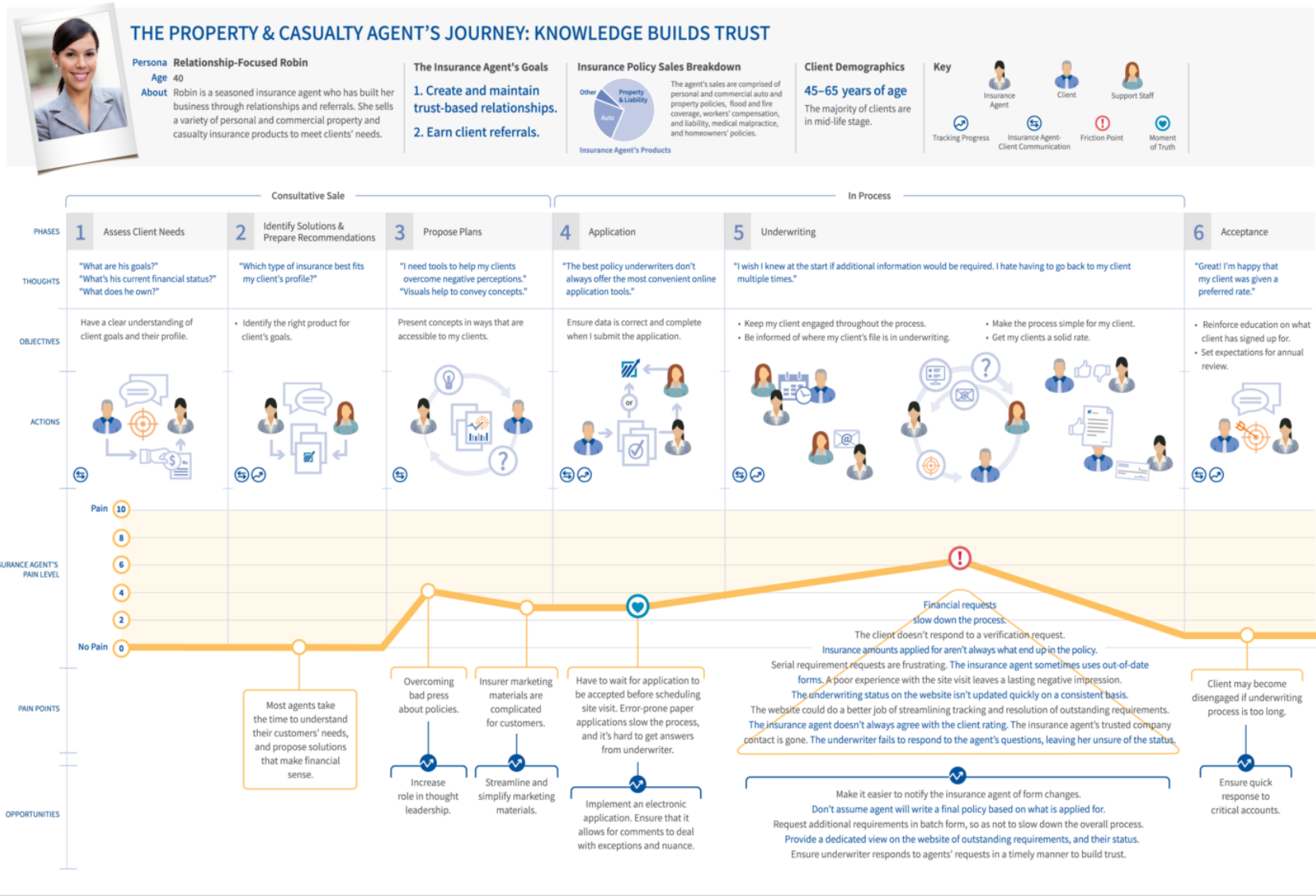
Tom is a Virginia driver who was told he may need a Real ID Driver’s License for plane travel. He needs to find out if he needs it and get one if necessary.

	Awareness	Education	Preparation	Transaction	Support	
Customer Activity	Tom is told he may need a	Tom researches	Tom obtains SS Card as	Visits field office. 15min	Calls to see when ID will	
Mindset	Confused, Annoyed, Who	Many options for	Feels like spent all day	Line not too long. Facility	Annoyed it is late, Happy	
Touchpoints	Flyer in renewal notice.	Website, Call Center	Website, Call Center	Field Office	Call Center, Field Office	
Emotions	    					
Opportunities	Better customer awareness – more channels	Simpler info on website. More training call staff	Better support for obtaining documentation	Reduce time in the field office	Provide proactive notifications and on-line lookup	

Example Map – Online Grocery Customer

STAGE	AWARENESS	CONSIDERATION	DECISION		DELIVERY & USE			LOYALTY & ADVOCACY	
CUSTOMER ACTIVITIES	Hear from friends, see offline or online ad, read from newspapers	Compare & evaluate alternatives	Add groceries to shopping cart	Make an order	Receive or pick up on order	Contact customer service	Enjoy groceries	Order again and/or order more	Share experience
CUSTOMER GOALS	No goals at this point	Find the best solution to buy food	Find and select products easily, get inspired	Order effortlessly	Receive or pick up an order effortlessly and when needed	Get help if problems appear, request for refund	Have the right and good quality ingredients	Repeat good customer experience	Share feelings, give feedback
TOUCHPOINTS	Word of mouth, traditional media, social media	Word of mouth, website, brick & mortar store, social media		Website, app, order confirmation email	Delivery service, packing, messages (email, SMS, phone call)	Phone, email, chat	Food products, packages, other materials		Word of mouth, social media
EXPERIENCE	 	 	 	 	 	 	 	 	
	<i>Interested, curious</i>	<i>Requires effort but excited</i>	<i>Excited</i>	<i>"Payment is painful"</i>	<i>Requires effort, happy when received</i>	<i>Frustrated</i>	<i>Satisfied</i>	<i>"This is easy"</i>	<i>"I have to share this"</i>
BUSINESS GOAL	Increase awareness and interest	Increase number of website visitors	Increase shopping cart value & conversion rate	Increase online sales and conversion rate	Deliver on time and minimise the delivery window	Increase customer service satisfaction, minimise waiting time	Make products to match expectations	Increase retention rate and order value and/or frequency	Turn customers into advocates, turn negative experiences into positive
KPIs	Number of people reached	New website visitors	Shopping cart value, conversion rate	Online sales, conversion rate	On time delivery rate, average delivery window	Customer service success rate, waiting time	Product reviews	Retention rate, order value and frequency	Customer satisfaction
ORGANISATIONAL ACTIVITIES	Create marketing campaigns and content both offline and online, PR	Create marketing campaigns and content both offline and online	Optimise grocery shopping experience	Optimise online purchase funnel, order handling	Picking & delivery	Organise customer service	Develop products & product range	Target marketing, make re-ordering easy, upselling and/or cross-selling	Manage feedback and social media, develop sharing / inviting possibilities
RESPONSIBLE	Marketing & Communications	Marketing & Communications	Online development, Customer service	Online development, warehouse, logistics	Warehouse, logistics	Customer service	Product development, purchasing	Marketing, online development	Customer service, online development
TECHNOLOGY SYSTEMS	CRM, analytics, programmatic buying platform, social media	CRM, analytics, CMS, marketing automation	CRM, analytics, CMS, ecommerce platform, PIM	CRM, analytics, CMS, ecommerce platform, PIM, inventory system, marketing automation	CRM, analytics, order & delivery system, marketing automation	CRM, analytics, help desk, ticketing system, chat	CRM, analytics, vendor management system, PIM	CRM, analytics, marketing automation, ecommerce platform	CRM, analytics, marketing automation, ecommerce platform, social media analytics

Example Map – Insurance Agent Property & Casualty



Example Map (Complex) Template

Guiding Principles

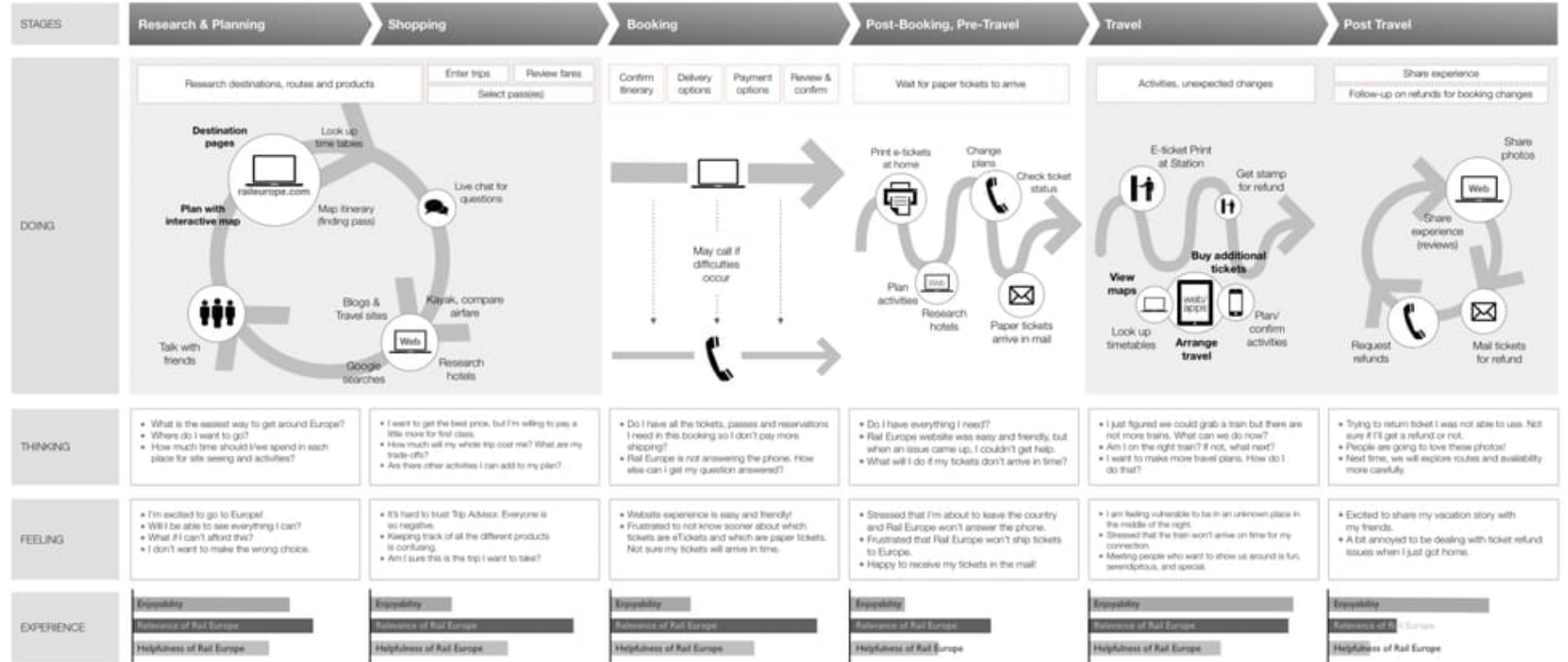
People choose rail travel because it is convenient, easy, and flexible.

Rail booking is only one part of people's larger travel process.

People build their travel plans over time.

People value service that is respectful, effective and personable.

Customer Journey

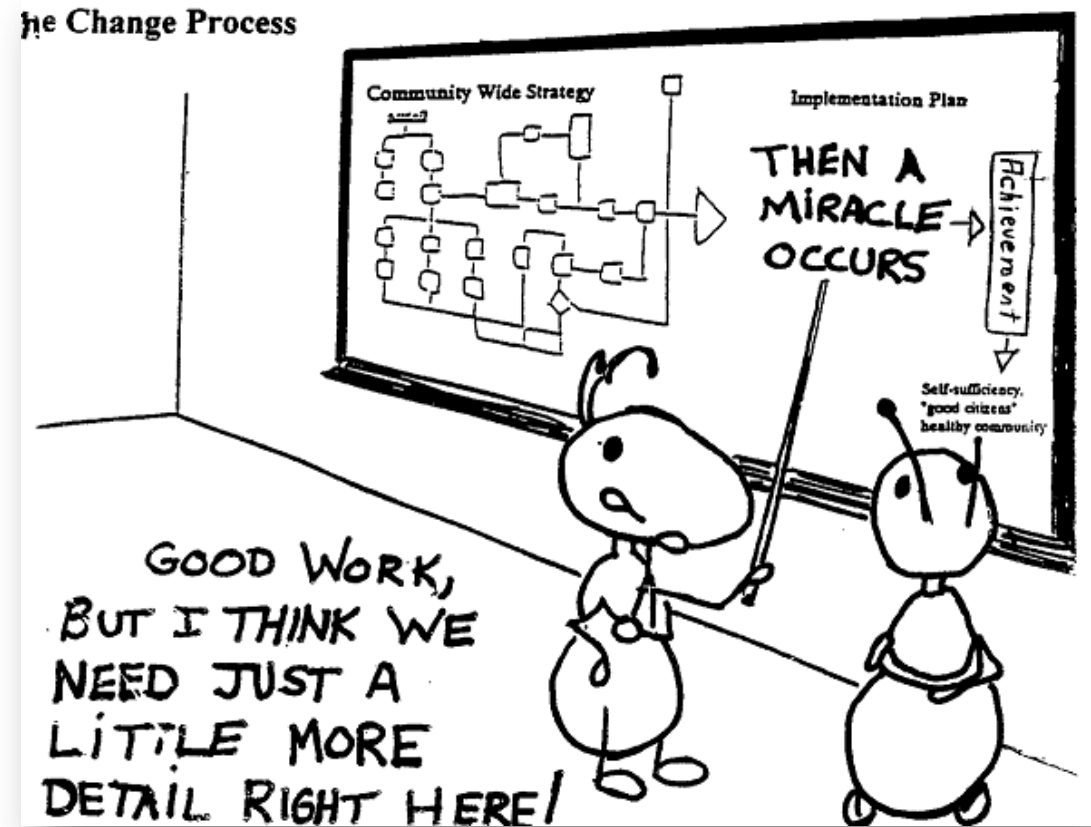


Opportunities





Journey Maps & Strategic Planning



Two Important Topics

Journey Mapping is very closely aligned with Strategic Planning.

Strengths & Weaknesses

- What is working well?
- What is not working well?
- How do we want to do business in the future?



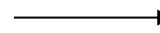
Stakeholders

- Who are they?
- What do they need?
- All the same priority?
- What's the difference?
 - Public sector partners
 - Businesses
 - Private citizens

Stakeholder viewpoint analysis allows us to uncover much more detail when planning.

What Do We Need In Future Operations?

- Agency Staff & Management



- On Line Services
- Better Enforcement of Business Rules
- Reporting Tools
- Document Scanning

Stakeholder viewpoint analysis allows us to uncover much more detail when planning.

What Do We Need In Future Operations?

Stakeholders

- Agency Staff & Management
- Treasury
- 3rd Party Coll. Vendors
- Practitioners
- Legislature
- EROs (Electronic Return Originator)
- Other State Agencies
- etc.

Future Needs

- On Line Services
- Understandable Taxpayer Records
- Flexible Search
- Automate Billing & Refunds

Stakeholder viewpoint analysis allows us to uncover much more detail when planning.

What Do We Need In Future Operations?

Stakeholders

- Agency Staff & Management
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Future Needs

- On Line Services
- Better Enforcement of
- Understandable
- Less Paperwork
- Integrated License
- Faster Refund Processing

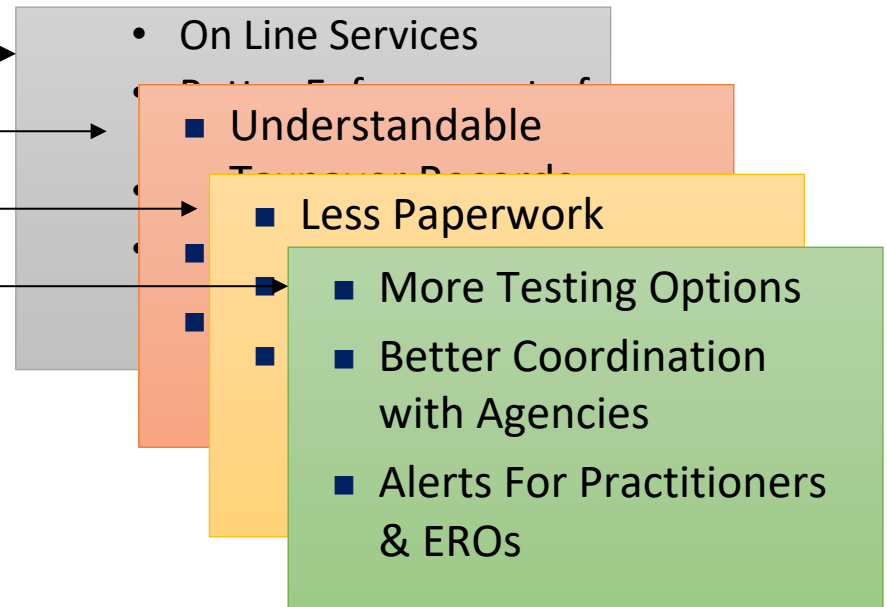
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What Do We Need In Future Operations?

Stakeholders

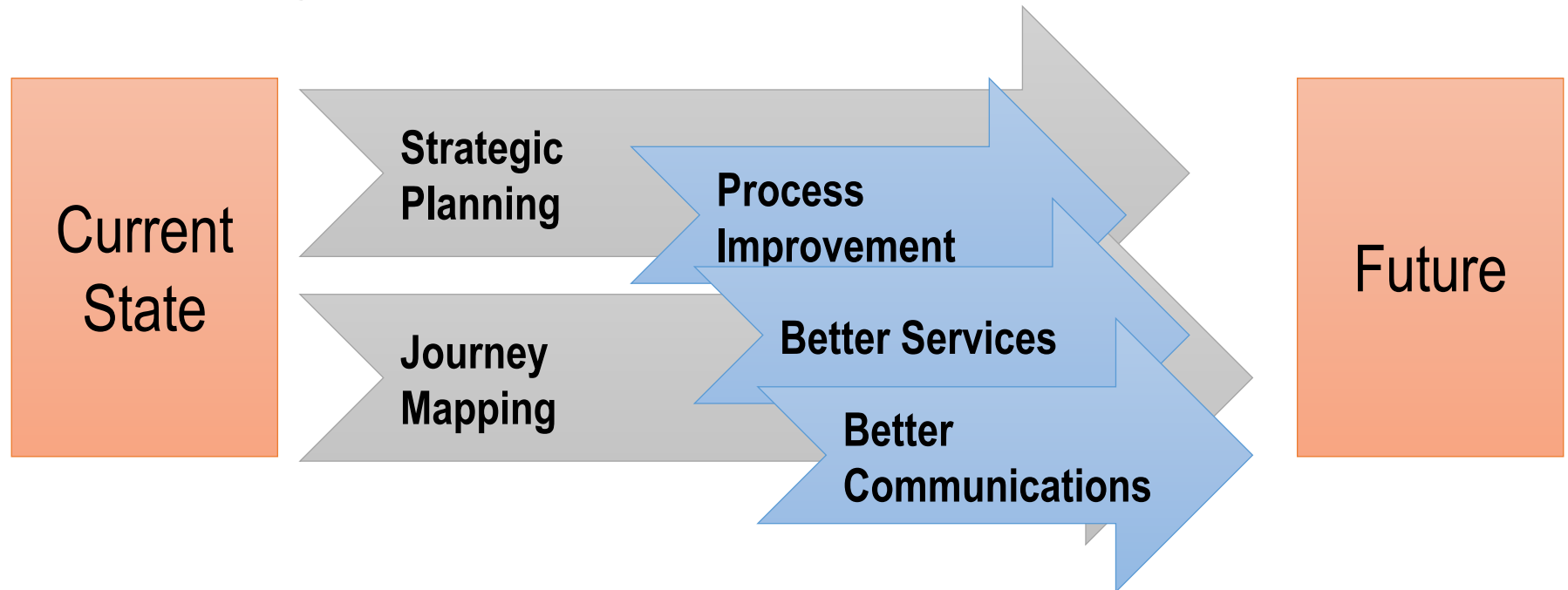
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Future Needs



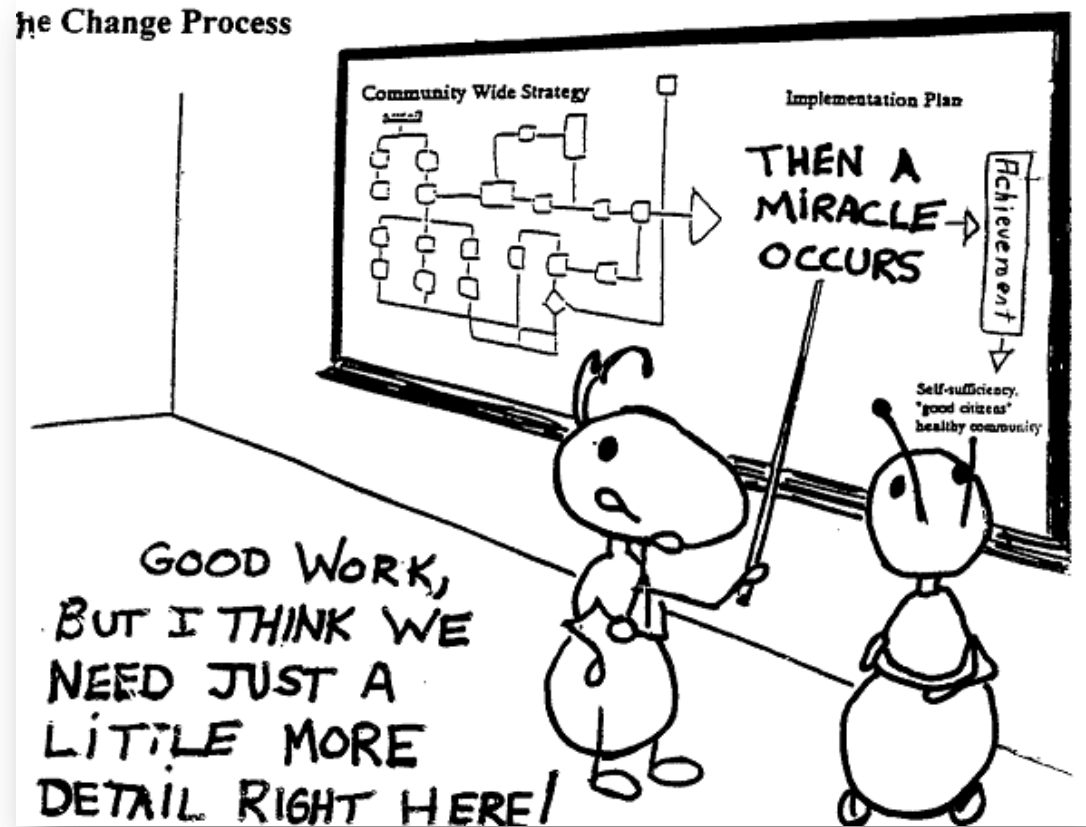
In Summary

- Journey mapping is a great tool for understanding the customer's experience with government.
- Journey mapping is a tool for strategic planning and process improvement.
- Think about business processes and stakeholders when creating the future.





Journey Maps & Employee Experience



Journey Mapping is very closely aligned with Organizational Change

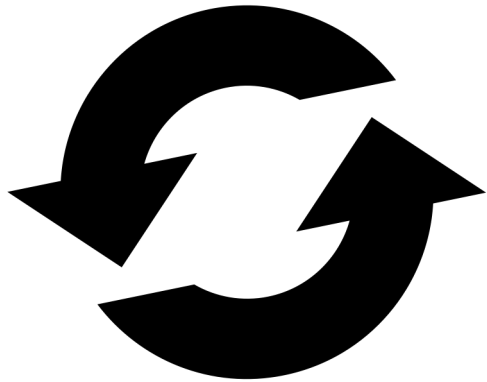
SWOT

SOAR

Agile Change

ADKAR

Kotter



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