



Journey Mapping for Change – August 2019

Introductions



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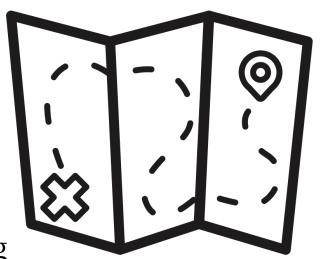






Journey Mapping

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







Concept Overview

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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



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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 - Innovation Is the current experience outdated compared to 'digital life' expectations in our modern world?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.

Broad Strategic Planning

- How do we want to reinvent our operations?
- What new services should we offer?
- How do we increase customer satisfaction?

Why are users abandoning

Detailed Process Review

- the web process on the third screen?
- Why was customer satisfaction low during the rollout of the new service?
- How and when do we get users to sign up for our mailing list?



Journey Map Components

Common Elements of a Journey Map





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Components of aJourney 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.

		X				
	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...

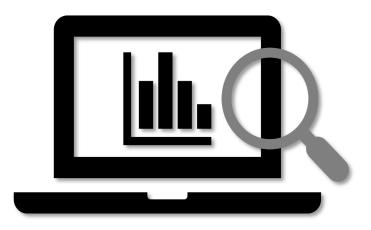


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Step 1 – Research

 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



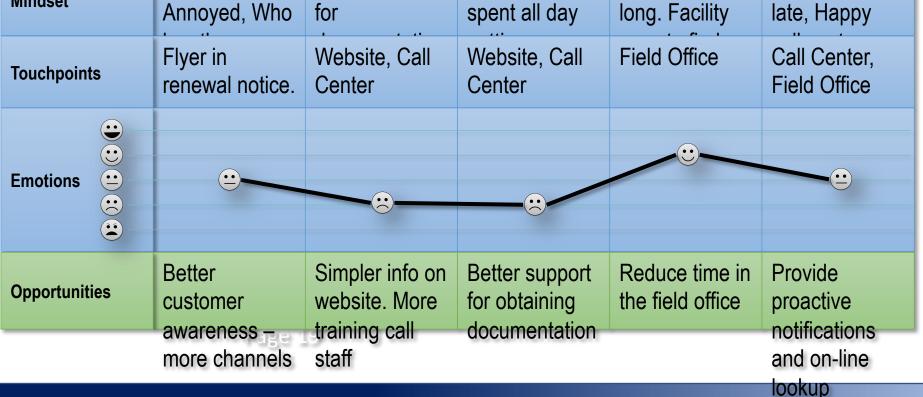
"If Alan Greenspan can tell Congress that he might very well have been wrong about basic economic principles for the past forty years, why can't you admit we've been lost for the last twenty minutes?"



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A Public Sector Journey Map – New Driver's License

Tom, 28, Best Tom is a Virginia driver who was told he may need a Real ID Driver's License Buy Salesman, for plane travel. He needs to find out if he needs it and get one if necessary. Getting married Transaction Education Preparation Support Awareness Tom is told he Tom obtains Visits field Calls to see Tom **Customer Activity** SS Card as office. 15min when ID will may need a researches Feels like Confused, Many options Line not too Annoyed it is Mindset Annoyed, Who long. Facility late, Happy spent all day for Flyer in Website, Call Website, Call Field Office Call Center,





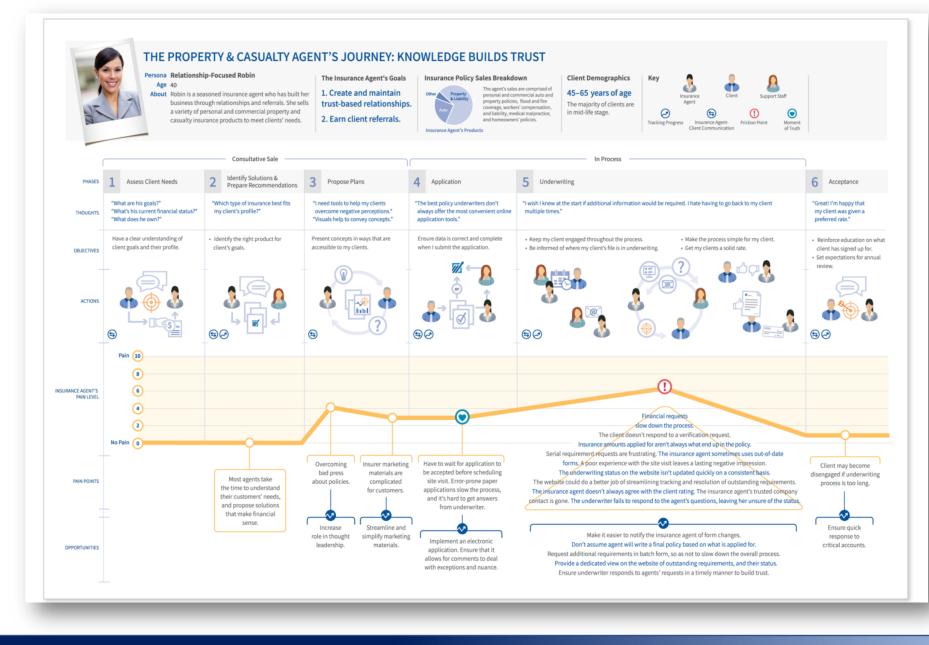
Example Map – Online Grocery Customer

STAGE	AWARENESS Hear from friends, see offline or online ad, read from newspapers	CONSIDERATION Compare & evaluate alternatives	DECISION		DELIVERY & USE			LOYALTY & ADVOCACY	
CUSTOMER ACTIVITIES			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 in- gredients	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	 P P<	P Requires effort but excited	Q Excited	P ayment is painful [#]	P Requires effort, happy when received	Pustrated	Q Satisfied	P "This is easy"	"I have to share this"
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 satisfac- tion, 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 automa- tion, ecommerce p form, social media analytics



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Examplep Mapher Agent Property & Casualty





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Examplesii Map^{(Complex} Template

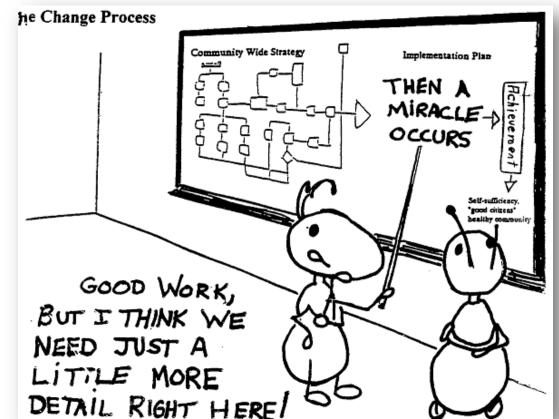
People choose rail travel because it is convenient, easy, and flexible.		Rail booking is only one travel process.				People value service that is respectful, effective and personable.	
Sustomer Jo	urney						
STAGES	Research & Planning	Shopping	Booking	Post-Booking, Pre-Travel	Travel	Post Travel	
	Plessarch destinations, routes and prod	cta Enter trips Peview tares Select passive)	Confirm Delivery Payment Pervew & confirm	Wait for paper tickets to arrive	Activities, unexpected changes	Share experience Follow-up on refunds for booking changes	
20146	Tak with	Live chat for questions	May call if dflicuties occur	Print e-tickets at home Description Page Page Activitien Page Page Page Page Page Page Page Page		Share photos Share	
THINKING		Ferenarch holds ferent to get the best pron. but I'm willing to get the itile more to find class. Hee much will my whole the cost me? What are my baster offs. Are three other activities I can add to my plen?	Do I have all the tokets, passes and reservations I need in this booking so I don't pay more stepping? Rai Empose in not answering the phone. How else can I get my question answering?	Do I have everything I need? Fiel Europe website was easy and friendly, it when an issue came up. I couldn't get hep. What will I do if my tokets don't arrive in ten	 Am I on the right train? If not, what next? 		
FEELING	Fini excited to go to Europel WIII be able to see everything i can? What if i can't afford this? I don't work to make the wrong choice.	Th hard to bust fits Advisor. Everyone is so regardly. Nearing track of all the different products is contract, And sum this is the typ I want to take?	Website experience is easy and hendy! Frustrand to not know sooner about which solvets are efficients and which are paper tokets. Not sure my lickets will arrive in time.	Stressed that i'm about to kerve the country and Rait Europe won't answer the phone. Fourthand that Pail Europe won't ship toket to Europe. Happy to receive my tokets in the mail	the reakle of the right.	Excited to share my vacation story with my frends. A bit annoyed to be dealing with ficket refun- tiones when i just got home.	
	Erjappiking University of the Errors Helpfuncture of Ral Europe	Reporting Entropy of Automatics Helpfulness of Rail Europe	Expupalities Admonster of Join Earlign Helpfalmers of Raf Earlign	Expenditory Robinson of Real Earlings Philphinese of Real Earlings	Engopelatory (Materiana of Rol Estimation) Helpfahrees of Rail Europe	Economic Constanting	
XPERIENCE	Children and Concerns and Conce						
pportunitie		·	PLANNING, SHOPPING, BOOKING		POST-BOOK, TRAVEL, PO	DBT-TRAVEL	
pportunities	5	Support people in creating their own solutions.	the second se		s with information Improve the paper tick		



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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



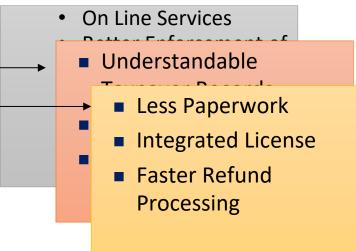
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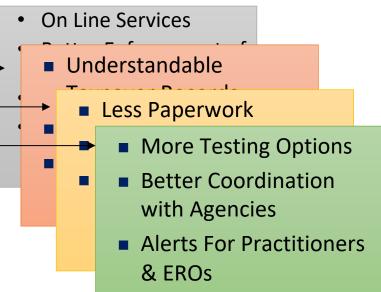
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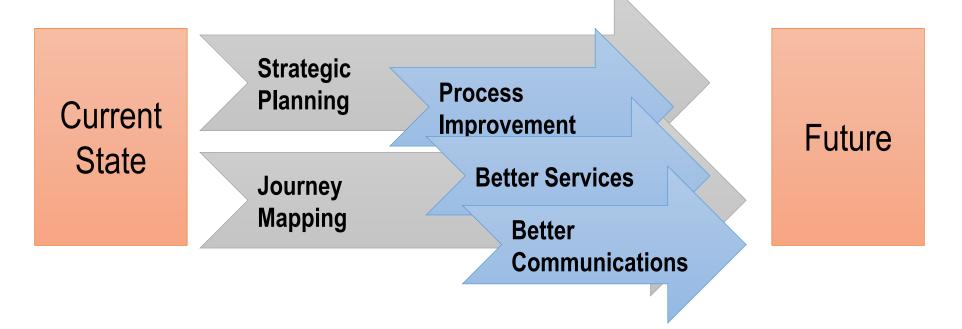
Future Needs





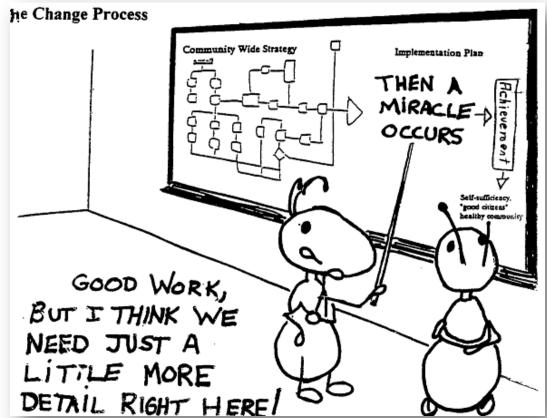
In Summary

- 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 &



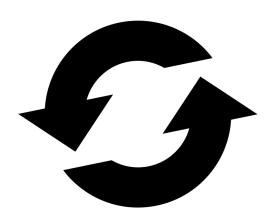
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Journey Mapping is very closely aligned with Organizational Change

SOAR

SWOT



Agile Change



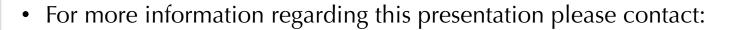
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