Customer Journey Mapping

Guide for Practitioners

HM Government

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Section 1

Introduction

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INTRODUCTION

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. Used well, it can reveal opportunities for improvement and innovation in that experience, acting as a strategic tool to ensure every interaction with the customer is as positive as it can be.

Across all areas of government there's a growing emphasis on getting closer to customers, to understand what really drives behaviour and attitudes in order to design and deliver services that meet the needs of people and businesses rather than the needs of government. This is reflected in the recent cross-government Service Transformation Agreement, which set out the need for departments, agencies and local government to show how they are improving customers' experiences of their services.

Journey mapping, focusing as it does on tracking and describing customer experience, is one of the tools that can help do this. It sits alongside other approaches, such as mystery shoppers and focus groups, that can bring you close to the customers that you serve*.

In helping bring customers' stories to life, journey mapping can challenge preconceptions and help change perceptions, acting as a call to action and contributing to culture change. The insights that it generates can help shape strategy and policy, to improve people's experiences and lead to greater efficiency within government. At its best, journey mapping can be truly transformational.

This Guide for Practitioners sets out to demonstrate the use and value of journey mapping. Assuming no prior knowledge, it starts with a definition of what journey mapping is and guidance about when and how to use it. It describes the circumstances in which journey mapping can be of most benefit, sets out the different tools and mapping techniques that exist and gives practical guidance about using and benefiting from these. Three main techniques are described. There is a section of this guide relating to each of them, but the three are not mutually exclusive – their benefit can be maximised by using all of them at the appropriate point in the lifecycle of a project.

In putting the guide together, we have reviewed and drawn upon best practice. Some of the learning has come from leading-edge companies in the private sector, but we have also included in the guide many good examples of how journey mapping is already being used within government.

"At its simplest, journey mapping helps you tell a customer's story with passion and narrative, to drive insight and build engagement. Comparing the customer's story with current systems and processes can help you identify priority actions and focus resources, and adding quantification to this tells you how many people are affected, and the costs involved. As you build the layers of understanding you really come to maximise the benefit."

* The full range of such tools is set out in "Customer Insight in Public Service: A Primer' – see page 9.

Introduction

CUSTOMER JOURNEYS IN GOVERNMENT

Many of the customer journeys dealt with by government cut across departmental boundaries, and it's for journeys like these that customer journey mapping is particularly valuable. It helps you to see things from the customer viewpoint, cutting across silos and forcing you to think beyond your own priorities or policy agenda.

By customers we mean anyone – people or businesses, who use either central or local government services.

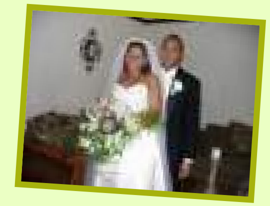
INDIVIDUAL JOURNEYS

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

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

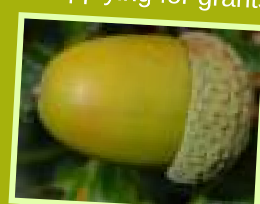
Leaving education
- Further education
- Work, PAYE, tax
- Benefits
- Student loan repayment

Getting married
- Benefits
- Taxes
- Registration
- Name change



BUSINESS JOURNEYS

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



Paying tax/complying
- End of year returns
- VAT
- NI and accounts
- Auditing requirements

Employing someone
- Jobcentre Plus
- PAYE
- National insurance
- Compliance

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

Buying/moving house

- Conveyancing
- Moving to new area
- Council tax
- Parking

Retiring

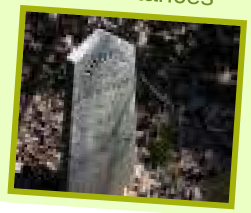
- Applying for pension
- Tax on retirement income
- Age concessions

Becoming a carer

- Incapacity benefits
- Disability benefits
- Pensions
- Health services
- Care homes

Bereavement

- Registering death
- Benefits
- Pensions
- Notifying change of circumstances



International trade

- Import and export regulations
- Tax and VAT
- Visa services

Closing down

- Changing name, address or status
- Redundancy payments
- Tax and accounts

CASE STUDY

At the Ministry of Justice a project was carried out before a journey mapping budget had been secured, simply by hypothesising the current and desired future journeys through the criminal justice system. Information wasn't verified by research, but gave a good starting point, building engagement and support internally and leading later to more formal journey mapping projects.

THE ROLE OF JOURNEY MAPPING

Journey mapping isn't an end in itself – it's one of a range of tools that can contribute to better customer understanding. Nevertheless, the very process of mapping the customer experience can have benefits. Getting close to customers and walking in their shoes can lead to great insights, and the view of customers that it affords can be a powerful way of winning hearts and minds amongst staff.

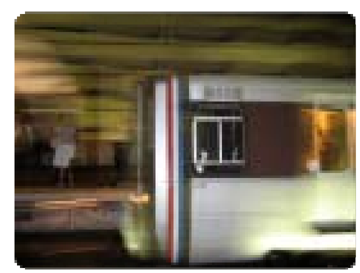
Journey mapping can be inspiring and powerful, but it's not a dark art. As with any research, best practice is to draw on the expertise of research professionals, but journey mapping is scaleable - simple journey maps can be drawn up by any well-informed practitioner following the processes described in this guide.

SIMPLICITY

There are lots of journey mapping approaches and methodologies described here, but the basic approach is extremely simple. It's not just a science for experts – anyone involved in developing, delivering or communicating customer services can contribute.

SCALEABILITY

Although journey mapping can involve formal research and large budgets, it doesn't have to be done that way. It's possible to start easily and cheaply – more can be added later if needed.



WHAT JOURNEY MAPPING IS USED FOR

Bringing the outside in; thinking and working to a customer-focused approach

Understanding the reality of people's lives

- Enable and deliver true customer focus and insight
- Define things from a customer viewpoint (e.g. understand big lifestage changes)
- Understand the differences between people (needs, ability, ways of doing things)
- Use deep understanding to design policy, delivery, engagement and communication

CASE STUDY — A NEW NUMBER TO CALL 101

- *Northumbria 101 partnership found that 70% of calls about anti-social behaviour were made outside traditional office hours*

Designing and overhauling systems and processes

- Show instantly where issues arise for customers
- Ensure systems are efficient, effective and customer-focused
- Understand transactions and deliver solutions
    - Take cost & complexity out of the system
        - Design customer experiences

CASE STUDY — h&f

- *Journey mapping in Hammersmith & Fulham has helped design new access systems. Capital costs were paid back in under 2 years, and annual savings of £4m pa are now expected*

Facilitating inter- and cross-departmental working

- Understand processes and transactions that cut across more than one function and/or department
- Overcome silo thinking
- Identify 'baton-change' moments
- Provide a highly visual way of looking at things, to help different functions identify common ground
- Find the best way of working together

CASE STUDY — DWP

- *Working across boundaries, 'Tell us Once' will reduce customer stress by enabling a citizen to report a birth or death only once*

Making decisions

- Make decisions on relative priorities between, for example, different customer groups
- Plan how to allocate resources – people, infrastructure, budgets and systems

CASE STUDY — HM Revenue & Customs

- *HMRC prioritised according to customer need in access policies for tax credits, so that face to face help is focused on those who need it most*

Introduction

"The real breakthrough was finding out why people found it so difficult to deal with us..."

"Outside-in thinking led to a real culture change – it made an impact on people who'd not really understood the customer before"

BENEFITS OF JOURNEY MAPPING

Journey mapping helps you look at your business from the outside in – it's perhaps the best tool available to help think laterally, outside your own policy agenda. By engaging with customers you can move from incremental service improvement to genuine service transformation. It's a win:win opportunity - better customer experience and greater operational efficiency; good customer understanding is also good business!

BETTER CUSTOMER EXPERIENCE

Journey mapping helps you to:

- See and approach things from the customer's point of view
- Identify where customers are being confused by different touchpoints, some of which you may not even be aware of
- Meet expectations (often raised by private sector experiences). Recognise people's time is valuable and be flexible about how and when they can access government
- Deliver a seamless, streamlined experience that cuts across silos by recognising where and when it makes sense to join things up for the customer
- Understand how much you can expect people to do, and recognise where you might be imposing undue stress
- Get it right when it really matters e.g. when emotions are highest or need greatest
- Look at the current situation and the 'ideal' side-by-side, giving a chance to genuinely redraw the customer journey
- Deliver information, messages and services at the most appropriate time

+

GREATER EFFICIENCY

Journey mapping helps you to:

- Bring about change across government in a way that cuts across silos
- Target limited resource for maximum impact
- Plan the most efficient and effective experience by reducing duplication and shortening the length of processes
- Anticipate demands on the system and plan so that you can meet these
- Prioritise between competing calls on resources by showing when and where needs are greatest and service most valued
- Identify 'baton-change' points where service or communication breakdown is most likely
- Identify problems and issues without attributing blame
- Identify cheapest 'cost to serve', and influence people to transact with you in a way that minimises costs (e.g. use new channels)
- Set performance indicators and standards so that you can measure and track progress over time

A GREAT EXAMPLE OF JOURNEY MAPPING

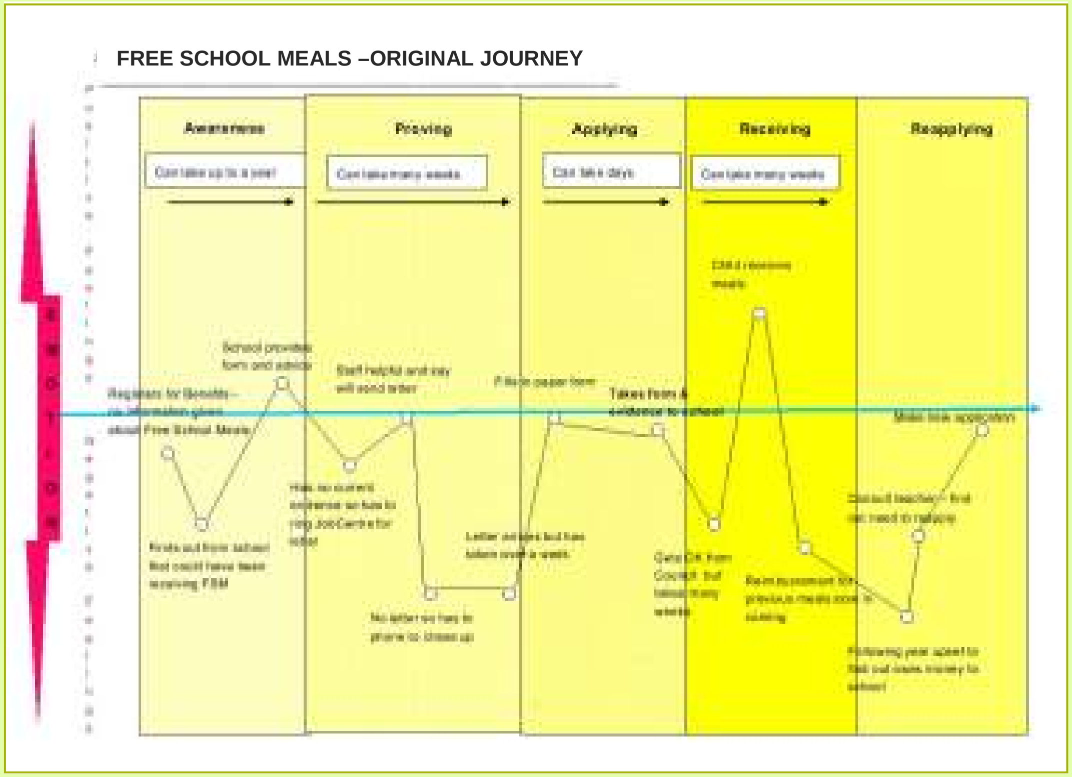
Tameside Free School Meals

Tameside Council identified that changes to the free school meals application process could deliver better customer service and, at the same time, save money for the council.

Journey mapping helped them understand the process from the customer viewpoint, whilst quantifying the cost to the council. Customers were abandoning claims, deterred by a complex process and the associated stigma. Meanwhile, for the council, on-line applications cost 7p, compared to £10 for a face-to-face application.

Clearly a system overhaul that directed appropriate customers online could help both customers and council, but the cost benefit could only be realised if the process could be followed end-to-end with no disruptions.

Using learning from the journey mapping they had carried out, Tameside were able to implement systems that allowed this uninterrupted process. Applicants for free meals now enjoy a simpler, more streamlined process that is much more cost-effective for the council.



Introduction

Journey mapping isn't just something that's nice to know – used correctly it can have very tangible business outcomes, as shown by the Tameside example. It's a key tool to use in helping to deliver policy objectives.

Introduction

ABOUT THE JOURNEY MAPPING GUIDANCE

This guide is intended as a practical reference document for people who will be carrying out the process of journey mapping. It's been designed not to be read from cover to cover, but rather to be consulted in stages according to interest and need.

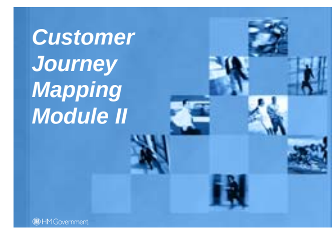
It's complemented by a range of other materials, each of which serves a specific purpose:

Customer Journey Mapping - Guide for Managers is written for a senior audience of service providers, policy makers and strategists across government and is relevant to all those involved in leading and supporting cross-government service transformation. It suggests how journey mapping can be used to introduce more customer-focused thinking to challenge organisational assumptions about the customer experience.

There are a set of four online training modules that serve as a quick introduction to journey mapping and give an overview of key approaches, tools and benefits. These can be found on the CIF website (see facing page for address).

ON-LINE CONTENT

An expanded 'toolkit' is also available on the CIF website and gives additional tools to the ones included here. You will see references to this throughout the guide, indicated by the icon shown here.



This guide was commissioned from Oxford Strategic Marketing by the Cabinet Office and HMRC jointly on behalf of the Customer Insight Forum (CIF).
CIF enables service transformation by being an advocate across government for the role and value of customer insight, promoting best practice and knowledge.

OTHER RESOURCES

Customer Insight Forum Website

- The following papers have been published by the Customer Insight Forum and are available at their web site, which also contains the online version of this document, training modules and additional tools described on the facing page: http://www.cabinetoffice.gov.uk/public_service_reform/delivery_council/workplan.aspx
    - **Customer Insight in Public Services: A Primer** which aims to establish a common language for customer insight and sets out some of the main sources of customer insight
    - **Establishing an Effective Customer Insight Capability in Public Sector Organisations** which sets out some guidelines and examples that help to explain how to establish an effective customer insight capability in a public sector organisation
    - Published as accompanying guidance to the Service Transformation Agreement, **Promoting Customer Satisfaction: Guidance on improving the customer experience in Public Services** explains the role that customer satisfaction and measurement research techniques should play in improving customer's experiences of their services and covers key issues such as the pros and cons of taking a common measurement approach for all public services.
    - Accompanying this guidance but targeting a practitioner audience, **How to Measure Customer Satisfaction: a tool to improve the experience of customers** is a toolkit document designed to help public service providers improve the experience of their customers by understanding how to undertake and make best use of effective customer satisfaction measurement.

Government Communication Network (GCN) Engage

- Gives information and advice on how to deliver customer-focused communication, with advice on journey mapping in this context. Go to www.comms.gov.uk

Service Transformation Agreement

- A Government-wide commitment to build services around the needs of citizens and businesses will be integral to the achievement of each of the PSA outcomes for the next spending period (2008 - 2011). The Service Transformation Agreement underpins delivery of the new PSA framework, setting out the Government's vision for building services around the citizen and specific actions for each department in taking forward this challenging agenda. The PSA Delivery Agreements and the Service Transformation Agreement are all available at:

  http://www.hm-treasury.gov.uk/pbr_csr/psa/pbr_csr07_psaindex.cfm

Customer Insight Protocol

- Prepared for use by councils, partners and umbrella organisations in designing and analysing future local surveys and in gaining extra value and information from existing data sources. It is available to download from the following web address:

  http://www.lga.gov.uk/content.asp?lsection=59&id=-A78492C2&ccat=1335

COI

- The Research Unit at COI can offer consultancy and advice across the range of research methodologies and can procure and manage projects on your behalf via their comprehensive research roster. In the first instance, please contact Fiona Wood, Director of Research, 020 7261 8905, fiona.wood@coi.gsi.gov.uk

The Customer Insight Forum is the best starting point for more information, and can help you access the other resources listed on the left.

You can contact the Customer Insight Forum by emailing customerinsight@cabinet-office.x.gsi.gov.uk or by telephoning 020 7276 3182.

HM Government

Introduction

Journey mapping was used to improve the journey experience and to develop a really compelling proposition that would make people want to use Eurostar. It also helped the Eurostar management to make decisions on which parts of the journey to invest in, and to set up customer satisfaction tracking.

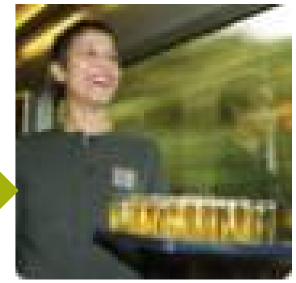
PRIVATE SECTOR CASE STUDY: EUROSTAR

Eurostar was not an immediate success. The management of Eurostar decided to use journey mapping to improve radically the customer experience. Here's how they used different techniques to gain the insight they needed.

SENIOR STAFF

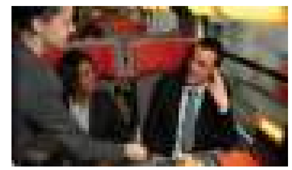
A workshop was held with senior board members who did not, traditionally, have a customer orientation.

They were encouraged to role-play different customer groups, even dressing up in costume, in order to map the highs and lows of the journey for different customers.



OBSERVATION

After the workshops, the senior board members were encouraged to make the journey for real and 'shadow' passengers who looked like the ones they had role-played in the workshops.



By having them make the journey in this way, a number of key outcomes were achieved:

The management appreciated that they couldn't treat all customers the same. Business people had very different needs from leisure passengers.
And they were able to suggest really practical and workable solutions to problems, which not only improved the experience but reduced costs in many cases.
Manager participation and engagement enabled fast action by having great ideas championed from the top.

RESEARCH

Independently of the role-playing exercise, research was carried out amongst passengers by the French part of the organisation.

This confirmed the highs and lows for various traveler types.

Together these approaches enabled Eurostar to produce and verify detailed journey maps of the whole experience for different customer groups, mapping the high and low points. In particular, the work identified the real 'WOW' factor of travelling on Eurostar – the arrival right in the heart of the city, which was later developed into a compelling communications proposition. See pages 96-97 for more information about the Eurostar journey mapping work.

Section 2

When to Journey Map

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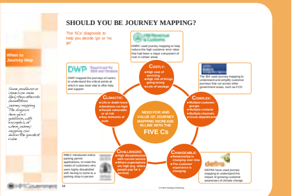
WHEN TO JOURNEY MAP: INTRODUCTION

The four critical questions to help you get started:

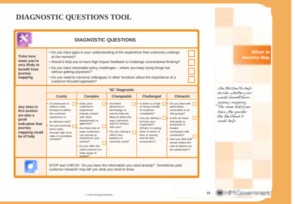
When is journey mapping of greatest value?

See page 12



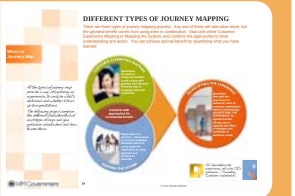
Should you be journey mapping to address your issue?

See page 13



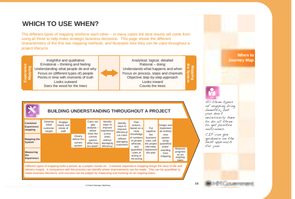
What type of journey maps exist?

See page 14



Which should you use and when?

See page 15



These questions will help you identify which part of the guide to go on to.

Journey mapping is a tool, not an end in itself.

There will be times when it's an appropriate tool and other times when it's not. There are also different types of journey mapping, each with its own strengths and appropriate uses. In this section, we address the four critical questions shown on the left to identify whether, how and when to use journey mapping.

When to Journey Map

Some problems or issues are more likely than others to benefit from journey mapping. The diagram here gives guidance, with examples, of where journey mapping can deliver the greatest value.

SHOULD YOU BE JOURNEY MAPPING?

The '5Cs' diagnostic to help you decide 'go' or 'no go'.

NEED FOR AND VALUE OF JOURNEY MAPPING INCREASE IN LINE WITH THE FIVE Cs

COSTLY:
- High cost of servicing
- High risk of things going wrong
- Lots of wastage

COMPLEX:
- Multiple customer groups
- Multiple contacts
- Multiple channels
- Cross-departmental

CHANGEABLE:
- Relationship is changing over time
- The customer experience is changing

CHALLENGED:
- High dissatisfaction with current service
- Where expectations are high (e.g. where people pay for a service)

CLIMACTIC:
- Life or death issue
- Emotions run high
- People vulnerable or at risk
- Key moments of truth

CASE STUDY — HM Revenue & Customs

HMRC used journey mapping to help reduce the high customer error rates that had been a major component of cost in certain areas.

CASE STUDY — Home Office Border & Immigration Agency

The BIA used journey mapping to understand and simplify customer journeys that cut across other government areas, such as FCO.

CASE STUDY — defra

DEFRA used journey mapping to understand the impact of growing customer awareness of climate change.

CASE STUDY — The Royal Borough of Kensington and Chelsea

RBKC introduced online parking permit applications, to meet the needs of customers who were highly dissatisfied with having to come to a parking shop in person.

CASE STUDY — DWP

DWP mapped the journeys of carers to understand the critical points at which it was most vital to offer help and support.

DIAGNOSTIC QUESTIONS TOOL

DIAGNOSTIC QUESTIONS

TOOLS

Ticks here mean you're very likely to benefit from journey mapping

- Do you have gaps in your understanding of the experience that customers undergo 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? ☐

Any ticks in this section are also a good indication that journey mapping could be of help

'5C' Diagnostic

Costly	Complex	Changeable	Challenged	Climactic
• Do pressures to reduce costs threaten to affect the customer experience in an adverse way? ☐ • Are you incurring extra costs through high error rates or avoidable contacts? ☐	• Does your customer's experience include contact with other departments or agencies? ☐ • Are there lots of ways customers can access or experience your service? ☐ • Is the service offered to a wide range of people? ☐	• Are there advances in technology or comms that are likely to affect the way customers want to interact with you? ☐ • Are you seeing a shift in the balance of channels used? ☐	• Is there is a high or rising number of customer complaints? ☐ • Are you asking a lot from your customers? (What's it costing them in terms of time or money, and do they accept this?) ☐	• Do you deal with particularly vulnerable or at-risk groups? ☐ • Is this an issue that leads to emotional or heated exchanges with customers? ☐ • Doe you deal with issues where the cost of failure can be catastrophic? ☐

WATCHOUT

STOP and CHECK! Do you have the information you need already? Sometimes past customer research may tell you what you need to know.

Use this tool to help decide whether you would benefit from journey mapping. The more ticks you have, the greater the likelihood it could help.

All the types of journey map provide a way of exploring an experience, to analyse what's delivered and whether it lives up to expectations.

The following pages compare the different characteristics of each type of map and give guidance about when and how to use them

DIFFERENT TYPES OF JOURNEY MAPPING

There are three types of journey mapping process. Any one of these will add value alone, but the greatest benefit comes from using them in combination. Start with either Customer Experience Mapping or Mapping the System, and combine the approaches to drive understanding and action. You can achieve optimal benefit by measuring and quantifying what you have learned

SEE ALSO

For 'Measuring the Experience, see also CIF's guidance – "Promoting Customer Satisfaction".

WHICH TO USE WHEN?

The different types of mapping reinforce each other – in many cases the best results will come from using all three to help make strategic business decisions. This page shows the different characteristics of the first two mapping methods, and illustrates how all three can be used throughout a project lifecycle.

Experience Mapping		Mapping the System
Insightful and qualitative	⟷	Analytical, logical, detailed
Emotional – thinking and feeling		Rational – doing
Understanding what people do and why		Understands what happens and when
Focus on (different types of) people		Focus on process, steps and channels
Points in time with moments of truth		Objective step-by-step approach
Looks outward		Looks inward
Sees the wood for the trees		Counts the trees

BUILDING UNDERSTANDING THROUGHOUT A PROJECT

Customer Experience mapping	Develop initial customer insight	Engage hearts and minds of staff		Carry out gap analysis – where does the current system differ from the ideal?	Identify ways to improve experience (cross silos) without damaging efficiency	Identify ways to improve efficiency/ cut costs without damaging customers	Plan actions, based on a clear knowledge of numbers of people affected, and quantified costs of acting or not acting	Put together the business case, sell the project internally. Implement the plan	Design and implement an entirely new system using quantified under-standing from mapping	
Mapping the System			Clearly define the current system							
Measuring the Experience										Measure progress on an ongoing basis

Different types of mapping build a picture as a project moves on. Customer experience mapping brings the story to life and delivers insight. A comparison with the existing process can identify where improvements can be made. This can be quantified to make business decisions, and success can be judged by measuring and tracking on an ongoing basis.

All three types of mapping bring benefits, but you don't necessarily have to do all three to get positive outcomes.

CIF can give guidance on the best approach for you.

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When to Journey Map

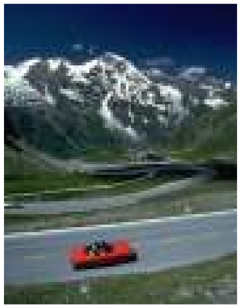
Depending on the nature of your issue, you can map different types of journey, from a literal, physical journey to the way people's thoughts and actions change over time.

DIFFERENT TYPES OF JOURNEY

Some examples of different 'journeys' are given below. In some cases we've given examples relating to one department, but journeys of each type can cut across more than one department and cross organisational boundaries

ACTUAL:

A literal, physical journey, e.g. prisoners being taken from court to prison.



TRANSACTIONAL:

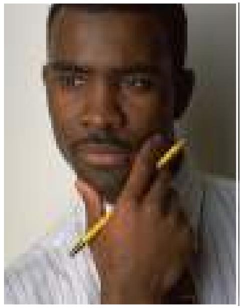
Going through a process with fixed steps, e.g. applying for free school meals or setting up a business.

EXPERIENCIAL:

An ongoing experience of a service or linked services; e.g. using the Health Service or going through the benefit system.

EMOTIONAL:

A mental journey that is experienced over time; e.g. going through a separation and making arrangements for children.

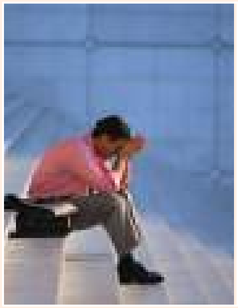


RELATIONSHIP BUILDING:

The development of a relationship over time;
e.g. a business customer working with government to grow a business.

RITE OF PASSAGE:

A major life change or lifestage event (very often cuts across many parts of government) e.g. bereavement or birth of first child.



SOME POTENTIAL APPLICATIONS FOR JOURNEY MAPPING

Once you get familiar with the types of map and the different journeys, you will see many more possible applications using the insights you get from journey mapping.

Types of Journey	Customer Experience	Mapping the System	Satisfaction Mapping
ACTUAL **e.g. Moving from court to prison**	How to engage people to begin the process of rehabilitation	How to use finite manpower effectively at the point of arrival	Setting and measuring appropriate metrics – not just outcomes but highs and lows across time
TRANSACTIONAL **e.g. Applying for free school meals**	How to ensure all applicants are offered an appropriate timescale and number of contact points	How to ensure smooth fit with other services, such as clothing grants, with the same eligibility criteria	
EXPERIENTIAL **e.g. Using the Health Service**	Understand the steps leading to diagnosis and treatment, and opportunities to engage patient in their healthcare	Identify 'baton-change' points – DH, charities, social services, local authorities	
EMOTIONAL **e.g. Going through a separation**	Identify how to get unwilling absent parents to take responsibility for their children	How to plan call centres – nature, size, skills required	
RELATIONSHIP BUILDING **e.g. Business and government**	See cumulative effect of cross-government legislation from a small customer viewpoint across the year	Identify and reduce red tape and migrate business to most cost-effective channels	
RITE OF PASSAGE **e.g. Birth of first child**	Understand differing need for support and opportunity for positive lifestyle change by customer segment	De-duplicate the system so people don't have to give the same details to multiple agencies	

You can use journey mapping:
- At the start of a project, to understand the experience better and help with a business case
- During the course of a project to help identify issues, opportunities and actions
- At the end, to validate your conclusions and to assess the effectiveness of the actions you are taking.

HM Government

When to Journey Map

AN EXAMPLE FROM OUTSIDE GOVERNMENT: HIGH STREET RETAILER

CASE STUDY

BACKGROUND

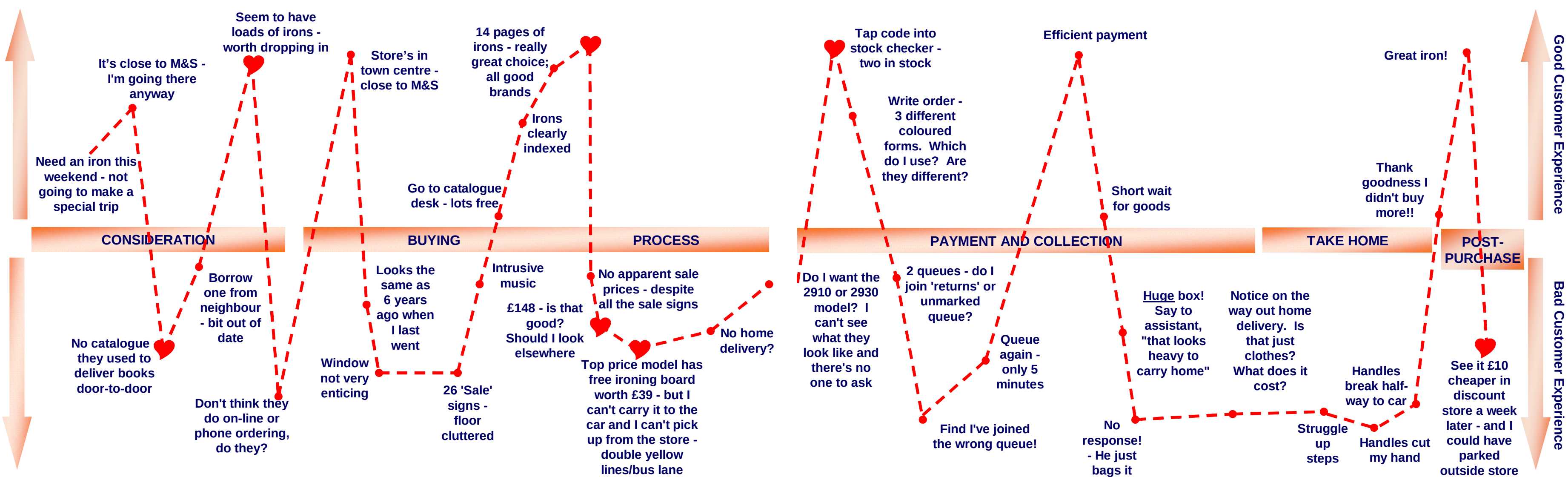
The retailer runs warehouse type stores and had traditionally been successful in keeping costs low through an operationally-driven approach.

However, what was efficient for the retailer was not necessarily delivering a good experience for the customer. People who didn't know the stores were being put off by what appeared to be a complex and time-consuming operation, especially for relatively inconsequential purchases. Journey mapping was used to understand the ups and downs of the customer experience.

OUTCOME

Journey mapping helped identify and understand a range of different shopping occasions, and the experience was reshaped to reflect customer needs rather than what was convenient operationally. Online business has been fully integrated with conventional stores so that, for example, people can check availability and reserve goods online for in-store pick-up. The operation today prospers as an award-winning multi-channel retailer.

Everyday Purchase Occasion – Buying an Iron



Section 3

Customer Experience Mapping

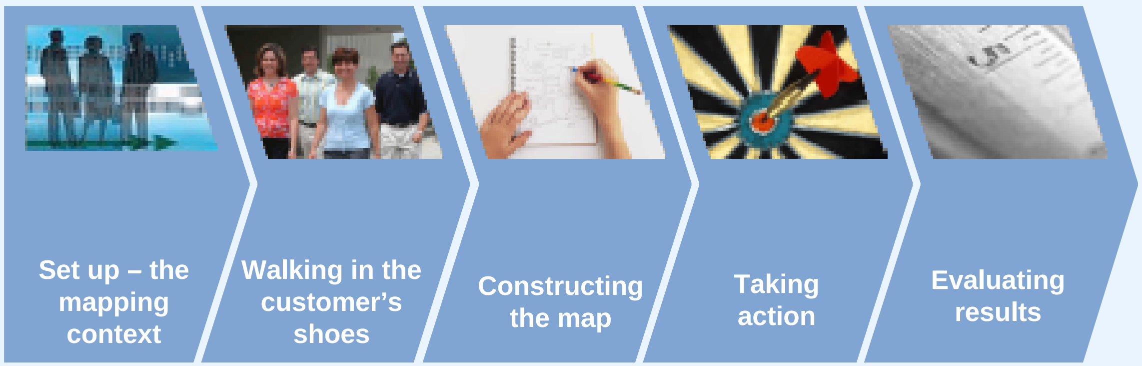
HM Government

INTRODUCTION

Customer experience mapping is a qualitative mapping technique that focuses on generating emotional insights for customer engagement.

In this section we describe how to plan and construct a customer experience journey map, starting from a deep understanding of what customers really think and feel, and moving through to taking action and evaluating results.

There are five steps in the process:



For simplicity, in the pages that follow, we have focused primarily on one particular mapping output, which is simple and concrete, and which can be applied in most situations. However, there are other ways of mapping the customer experience, with different levels of detail, and some examples of these are given on the following pages.

The starting point is always the customer. Knowing how your customers think and feel is the first step in creating a customer-focused organisation.

Customer Experience Mapping

This section describes the first of our three mapping approaches and sets out steps and tools to help.

ON-LINE CONTENT

Core tools are included in this guide but there are more in the online toolbox.

HM Government

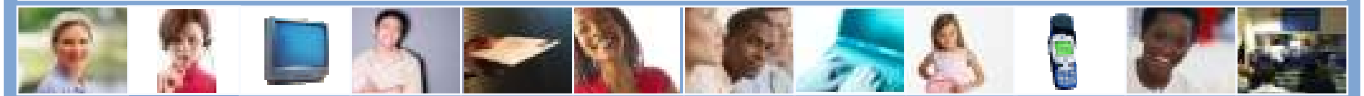
Customer Experience Mapping

This section takes you through how to complete a map. However, before starting to fill out any formats, there are a couple of vital steps - Set up and "Walking in the customer's shoes".

THE CUSTOMER EXPERIENCE MAP

The customer experience map shown here is the basic format you'll be using in this section. It tracks the main steps in a customer's experience and records how he or she thinks, feels and acts at each step. It's qualitative rather than quantitative and is used to drive a deep customer understanding.

CUSTOMER EXPERIENCE MAP



Objectives, scope & journey type				Customer segment			
Moments of truth							
Key journey steps							
Actions, feelings, thoughts and reactions at each step							
Touchpoints							

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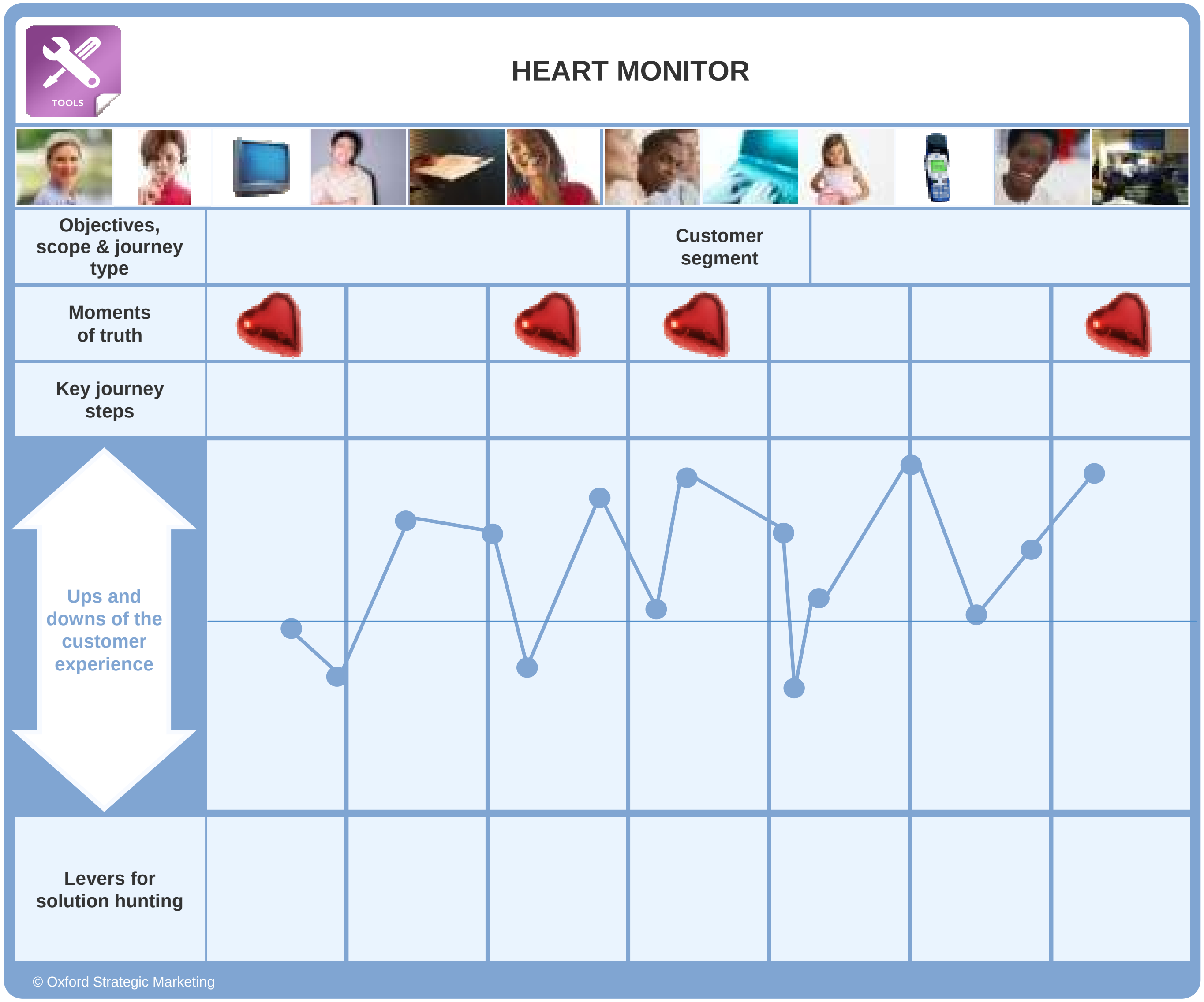
ALTERNATIVE MAPPING FORMAT

An alternative mapping format is the “heart monitor”, shown below, which plots the highs and lows in the customer experience.

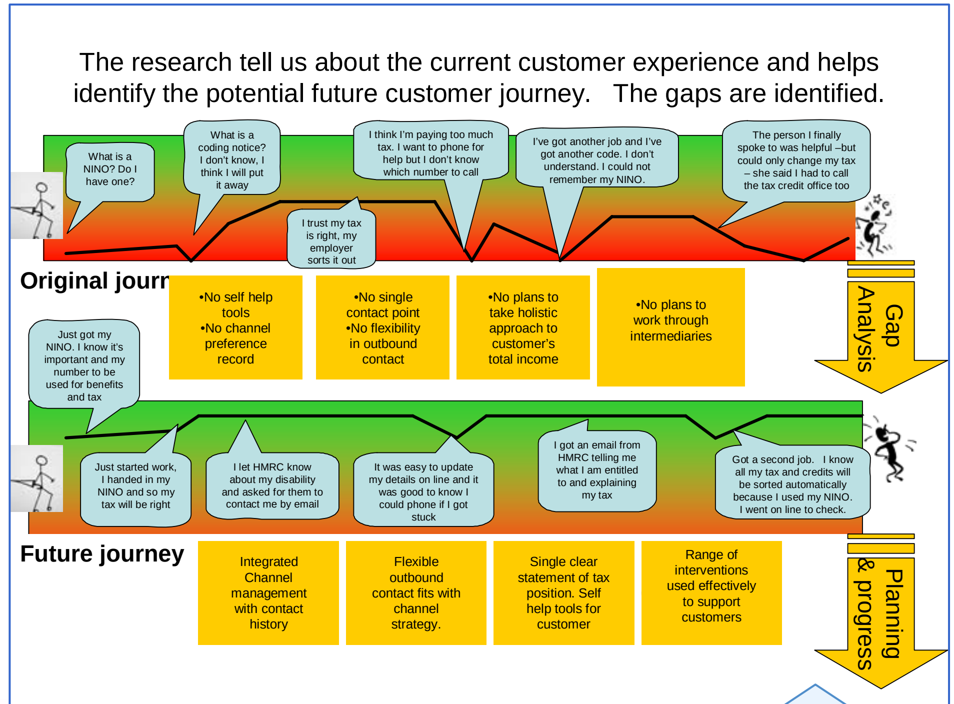


The heart monitor can be quantified and so is described and used as the main tool in Section 5 of this guide. However, you can create a qualitative heart monitor using the same basic process described here to create a customer experience map.

OTHER FORMATS

There are other formats for journey maps. There are no hard and fast rules about this – although we focus here on a particular type of journey map, use whatever works best for you and your particular issue.

Department of Health used simple descriptions and pictures for each step of the journey to map the potential impact of a communication campaign for weaning babies.



The DVLA mapped journeys for electronic vehicle licensing which they summarised using visual imagery.

HMRC mapped current and future journeys with commentary and identification of gaps that needed to be addressed (work that was done some time ago and has now been actioned).

SET UP: THE CONTEXT

The very first step in any journey mapping project is to be clear about the context. This is a useful tool for a set-up team work session. You can use it as an agenda or checklist.

TOOLS

CONTEXT CHECKLIST

Who will use the maps?

- Identify key users, current expertise and knowledge or use of customer experience maps
- Agree how these key users will be involved in the process – the more involvement the better
- Identify additional stakeholders and agree how they should be involved/informed
- Ensure that everyone is clear and aligned in their expectations of the process and outputs

How will maps be applied?

- Confirm what the maps will be used for and the level of detail/robustness required
- Ensure you have set clear, measurable objectives for the exercise
- Are you also mapping the system? If so, how will you consider the two maps together?

What is the scope?

- Confirm the budget and timescales
- Agree how and when other departments and agencies should be involved
- Do an insight audit – what do you know already?
- Make an initial plan of the approach, process and anticipated outputs

This planning phase is the crucial point at which to get up-front stakeholder buy-in. Without this you could find yourself with useful maps but no effective way of actioning them.

Customer Experience Mapping

CASE STUDY

DWP

DWP mapped the experience of becoming a carer to understand the challenges they face. This work highlighted the problems encountered as people become carers and identified opportunities for service improvement, and it continues to provide insight across Government. A practical lesson in the use of insight generally was also identified as part of this process – it is essential that stakeholders are sufficiently prepared to be able to receive, understand and act on the insight generated.

HM Government

Customer Experience Mapping

WATCHOUT

The precise definition of the journey needs to be confirmed after customer input.

However, you need to be clear up front about the broad parameters in which you are working.

SET UP: BROAD DEFINITION OF THE JOURNEY

You need very early on to define broadly the journey you are interested in to ensure it's the most appropriate one for the issue you are addressing.

Make a clear and unambiguous statement of the journey that you are interested in mapping.

This should be the usual, "typical" journey experienced by customers, not an unusual or aberrant event.

Check your definition

- Would your description be clear to someone coming fresh to this project?
- Are you thinking about and defining the journey from the customers' point of view, using their language?
- When you come to check it with them, will they recognise it?

Think about whether what you are interested in is really a single journey. Are there distinct components that should be split out or, on the other hand, is this part of a wider journey that need to be looked at in its totality?

Check how many journeys:

- Have you hypothesised a clear start and end point for this journey?
- Does it cover all the key parts of the customer's interaction with you?
- Does it cover a long time period? (Very long journeys may benefit from being split across more than one map)

Look beyond your own area to identify other departments and agencies which impact on your customer's journey - not just government but also appropriate NGOs. Does their involvement suggest or dictate an amended journey definition? Talk to colleagues and stakeholders to make sure you understand all the inter-relationships.

Check inter-dependencies

- Have you started from the customer's viewpoint, and not in terms of how government is organised?
- Have you consulted relevant stakeholders?
- How do these alternative viewpoints impact on your journey as currently defined?

SET UP : WHICH CUSTOMERS DO YOU WANT TO ENGAGE WITH?

Here we look at which customers or customer groups you need to focus on for the mapping process. The starting point for journey mapping must always be the customer, and the initial step is to decide *which* customer(s).

Can you map all customers together or do you need to segment and map different groups?
You need to be clear on available resources, and decide how widely you can engage with customers.

Check your scoping

- Can you truly map all customers together? It's quite unusual if you can
- How many groups do you need to map?
- What are the essential things you need to know and the big knowledge gaps?

Look at the information you have already about your different customer groups. Do you have a customer segmentation and, if so, is it relevant for the map you want to create? If you don't have a researched segmentation or it doesn't seem relevant, brainstorm types of customer who make the journey you're looking at. Frontline staff, knowledgeable people, delivery partners and past research may help.

Check customer groups

- Have you clearly defined any customer groups or segments?
- Are they distinct from one another?
- Have you thought not just about who people are, but what they do and how they think and feel?
- Is this the best way of dividing people up for this particular purpose?

If you don't need, or have the resources, to engage with all customer groups, you need to prioritise based on factors like:

- Who has the greatest need?
- Where is the current experience least satisfactory?
- Which customers represent the greatest number of journeys?

Check your prioritisation

- Does it feel right intuitively?
- Do people in the know (e.g. frontline staff) agree with it?
- If you get it right for these people will the problem be solved?

Create brief pen-portraits of your priority customers (an example of what these might look like is given in the online tool box). They will help create a shared understanding of who customers are, and allow you to identify which customers to journey map.
You can build on the portraits later.

Check your pen-portraits

- Are they written in non-technical language?
- Will they help you identify people to involve in the mapping process?

Journey mapping helped DfT to identify and understand key customer segments such as 'goods vehicle operators' and to suggest how access to services from various DfT Agencies could be joined up to benefit these segments

Customer Experience Mapping

You need to be crystal clear about which customers you map.
A good segmentation is a great starting point but, if you don't have this, you can use people who are close to customers to brainstorm and prioritise possible groups.

HELP

ON-LINE CONTENT

To learn more about segmentation, contact the CIF (see page 9) or see the journey mapping online toolbox. This contains other tools such as a pen portrait.

For local government there is also helpful advice in the Customer Insight Protocol – see page 9 for details.

HM Government

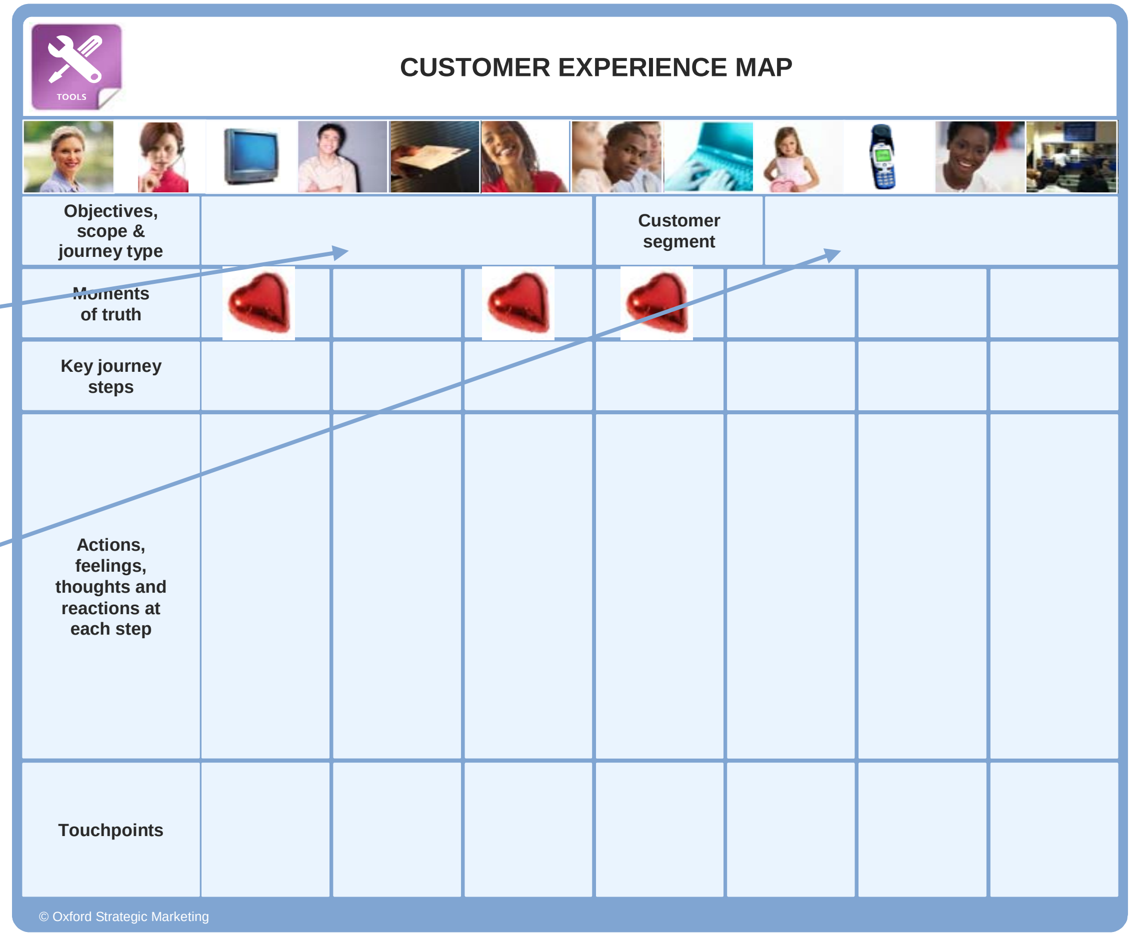
Customer Experience Mapping

SET OUT THE MAP(S) YOU WANT TO COMPLETE

Having thought about the context, broadly defined the journey and identified which customers you want to engage with, you can now set out your map or maps, filling in the first two boxes:

Objectives, scope and journey type
What this mapping needs to do.
Single, well-defined journey with clear start and end points.

Customer segment
The specific group you're mapping here, with key defining characteristics to distinguish them from other groups.



Define your customers in the way that is most appropriate for this map. This may be to do with who they are, but it could be based instead on behaviour or attitudes.

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WALKING IN YOUR CUSTOMERS' SHOES

You now need to head into a research phase to explore your customer's journey. Really understanding your customers – not just what they do, but how they think and feel - is at the absolute heart of customer experience mapping.

One decision you will need to make early on is whether to research the customer journey yourself or to use an agency to do this. The tool below compares the two approaches. It's not necessarily an either/or choice; you may decide to do some parts of the exercise in house and then go out to an agency for follow-up work, or vice versa.

TOOLS

IN-HOUSE OR AGENCY?

	In-House	Agency
GREAT FOR	✓ Getting personally close to the customer and seeing thing for yourself ✓ Opening the eyes of staff to the issues experienced by real people ✓ Engaging staff in the process and benefits of journey mapping ✓ Projects with limited time, scope or budgets	✓ Big projects where you need extra resource ✓ Complex or emotive subjects requiring specialist interviewing skills ✓ Cross-government projects where no one has clear ownership ✓ Where it helps to use a third party, seen to be independent of government ✓ Lending credibility to a study
WATCHOUT	• You need to be aware of MRS codes of conduct that apply to all research. Even if you're not using an agency, be sure to talk to your own research team about what can and can't be done • Be very careful not to come into this with internal view or preconceptions. Start with a completely open mind	• Ensure that the findings are really brought to life with photographs, videos and verbatim comments – not just summarised in a prose report

Customer Experience Mapping

What we cover over the next few pages are some qualitative 'customer closeness' techniques. More quantified approaches, used where measurement is important, are described in Section 5 of this guide.

The pages that follow describe four key tools for walking in your customers shoes.

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In an ideal world, recruiting actual customers is generally the best way to really understand the emotional impact of an experience. But there are alternatives that work well in many situations.

Customer Experience Mapping

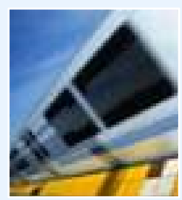
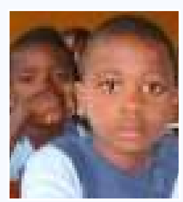
The decision about which event to choose will depend on:

- *What's feasible given your timescale and budget?*
- *What sort of journey is it? Is it a literal journey (e.g. travel to school) or virtual (e.g. choosing a school)?*
- *Over what timescale does the journey take place?*
- *What's your objective? E.g. if you need to get staff engagement and culture change, getting staff involved can be a big plus.*

DECIDING ON A MAPPING EVENT

There are different ways in which you can collect the information you need to map your customer's journey – we've called these 'Mapping Events'.

The key priority here is to understand the customer's journey as it really is now, although sometimes you may also want to use the opportunity to explore how it could be improved by asking customers to describe their 'ideal' journey.

WAYS TO MAP JOURNEYS		SOME EXAMPLES
Recruit actual customers from the appropriate segment to walk through the journey for real. - Happens in real time in the real world.		Within the Ministry of Justice, HM Courts Service (HMCS) followed this approach to map the experiences of victims, jurors and witnesses going through the legal process. The resultant maps showed a detailed emotional journey and were used to help improve the experience and make it less stressful for those involved.
Recruit real customers to **recall the journey** (e.g. choosing a school). - Done through focus groups or interviews, as soon as possible after the event.		In mapping Carer journeys, DWP carried out in-depth face-to-face interviews using their own External Visiting Officers. This resulted in very detailed journey maps with deep emotional understanding, that have helped to identify the points at which carers most need help and support.
Get **knowledgeable staff to 'walk the journey'**, recalling highs, lows, needs and emotions they see in customers. - Can do this as "mystery shoppers".		Eurostar used staff to go through the total customer experience of travelling between Paris and London, from booking to arrival. The exercise helped engage staff in the need for change, and resulted in the identification of tangible service improvements.
Construct the journey from a review of past research, staff views and knowledge and customer experiences. - Ideally using a group of people in a workshop.		When Tameside Council mapped the application process for free school meals, they recognised all customer groups had the same experience. Their Corporate Improvement Team were able to map this single segment effectively and introduce an experience that was quicker, cheaper and easier for customers.

HM Government

TOOL: MAPPING EVENTS

CHOOSING BETWEEN MAPPING EVENTS

Customers walk through the journey for real

GREAT FOR
- ✓ Actual, literal journeys
- ✓ Getting a powerful and true impression of actual emotions
- ✓ Gaining first-hand evidence with high levels of credibility

WATCHOUT
- Use enough people to get an objective view of a ‘typical’ journey

Real customers recall or anticipate the journey

GREAT FOR
- ✓ Journeys that take place over long periods of time
- ✓ Journeys where it would be impossible to follow the customer

WATCHOUT
- Memory can be deceptive; projected future actions even more so
- Recalling events, people are apt to play down the strength of the emotion they feel at the time

Knowledgeable staff ‘walk the journey’

GREAT FOR
- ✓ Building staff engagement
- ✓ Tapping into knowledge & experience of front-line staff
- ✓ Mapping areas where there may be sensitivities involved in asking customers e.g. very emotive areas, or mapping a child’s journey

WATCHOUT
- Be careful that staff take an external view of the process, not an internal one
- Be sure not to reinforce existing prejudices or perceptions

Journey is constructed from existing research and knowledge

GREAT FOR
- ✓ Getting team buy-in
- ✓ Building on existing research and expertise
- ✓ Projects with limited time or money

WATCHOUT
- Ensure you really have the knowledge and information to build an accurate journey
- May lack credibility with colleagues

“Staff and customers used completely different language when talking about the same journey. That was a real eye-opener – we’d never thought about it before.”

Use this tool to help decide which event best suits your purpose. You will often want to use more than one approach – a range of methods will always make your work more robust.

Over the next four pages, we introduce tools that can help when walking in customers' shoes, highlighting what each tool is good for and giving some watch-outs. Tools can be used on their own or in combination depending on the mapping event being used.

Customer Experience Mapping

GREAT FOR

- ✓ *Delving behind what's apparent on the surface*
- ✓ *Emotive and sensitive issues*
- ✓ *Extended, depth interviews*

WATCHOUT

- *Don't hypothesise what lies behind people's words – look at the evidence*
- *Don't over-weight any part of the "onion". All the layers are important*

TOOL: PEELING THE ONION

Getting to the heart of what really drives customers is like peeling an onion. The outer layer - what they do and say – gives some clues, but a really deep understanding can only come from looking at the heart of the 'onion' – deep emotions and passion points.

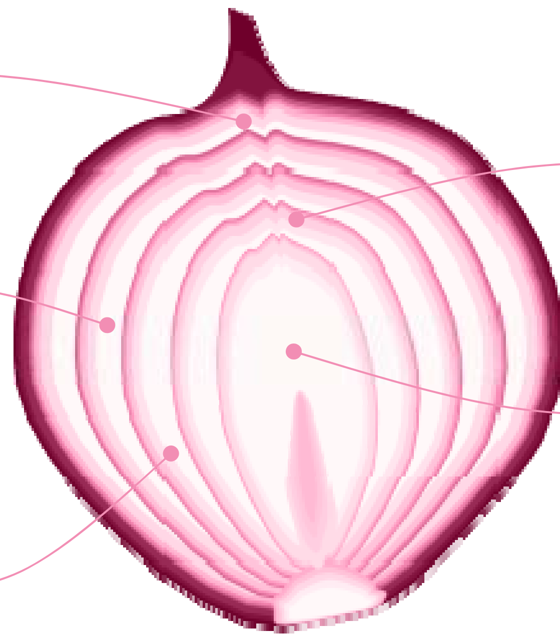
TOOLS

"PEELING THE ONION"
Deep Understanding Tool

Layer 1: Actions
- What people do
- Why – what's driving them?

Layer 2: Responses
- What people say
- Why – what's behind the words?
- How honest do you think they're being?

Layer 3: Language
- How people say things
- What words do they use? Capture real quotes
- What's the body language?



Layer 4: Feelings
- What are they feeling? Trust? Comfort? Irritation?
- What's causing this?

Layer 5: Deep emotions
- What are their real loves and hates?
- Where are the passion points?

Use this tool whenever you're talking to customers. Be prepared to ask difficult questions (sensitively!) and gauge all the layers of response. Videoing people can help analyse some of their responses and language later (but be sure to get permission).

HM Government

TOOL: CRITICAL QUESTIONS

Use this tool when you can't actually accompany a customer during their journey to plan, prepare and review the outputs from interviews. It can also be used with frontline staff and others who have customer contact.

"CRITICAL QUESTIONS" Interview Planning Tool

TOOLS

Questions to Ask Yourself	■ What are the top three questions about this journey that you can't answer? ■ How typical is this person's journey? What's unique to them/likely to apply to all? ■ Who or what aspect of the process influences them most? ■ How strongly do they really feel about this? ■ What are the real passion points? ■ What surprised you from what you heard? What was new to you?	
Questions to Ask your Customer	**… General**	**… For process improvement**
	■ Tell me about… ■ What did you think when…? ■ How did you feel when…? ■ What were the high and low points in your journey? ■ What really stood out for you (good or bad)? ■ If you could change on thing what would it be? ■ Why? (see '5 Whys' Tool)	■ What parts of the process were really essential? ■ Where did things get held up or take too long? ■ Did you have to do the same thing more than once? ■ Did you ever feel you were going backwards? ■ Were any steps unnecessary? ■ Were you clear who you were dealing with at every point?

Aim where you can to ask open-ended questions (that is, ones to which customers can't simply answer 'yes' or 'no'). If you use this type of questioning, it encourages respondents to speak.
BUT… avoid rhethorical questions – ask tangible things that people can answer.

Customer Experience Mapping

GREAT FOR

- ✓ Planning and preparing interviews where going with the customer on the actual journey isn't possible
- ✓ Keeping your questioning focused
- ✓ Getting the most from interviews

WATCHOUT

- Don't over-plan. Be pragmatic and respond to what people tell you
- One size doesn't fit all. Tailor your questions to your customer
- Be aware that people may not tell you their information in a sequential way – they may jump around so you will have to piece it together later

HM Government

Customer Experience Mapping

GREAT FOR

- ✓ Getting to the root of a difficult issue
- ✓ Investigating complex subjects
- ✓ Gaining a deeper understanding of an issue or an action

WATCHOUT

- Don't irritate people by constantly parroting "Why"! Think about different ways to probe deeper
- It doesn't have to be 5 whys. You may get to the heart of the matter with more or fewer questions

HM Government

TOOL: THE 5 WHYS

The '5 Whys' is a useful tool to get to the root of a difficult issue. It is also known as "laddering" – moving through the 'Whys' is like climbing the rungs of a ladder.

TOOLS

"THE 5 WHYS"
Questioning Tool

- As you talk to people, or investigate your issue, keep asking 'Why?' every time you are given an answer
- This is particularly good for probing issues about which people have deep-seated feelings and emotions
- It can also help probe root causes when you are tracking a series of events

CASE STUDY

'Emotional' example from HMRC

" I don't want to renew my tax credits even though I'm still eligible" … Why?

" It's too much stress" … Why?

" They don't care about customers" … Why?

" Last time they overpaid me and that was a real problem" … Why?

" They wanted a lump sum repayment and that was out of the question" … Why?

" I've no savings – the money me and my kids live on is what we get week to week"

In this case, understanding the real pain caused by overpayments had led to new processes to handle them within HMRC

CASE STUDY

'Root Cause' example from the NHS

" A patient got the wrong medicine" … Why?

" The prescription was incorrect" … Why?

" A wrong decision was made by the doctor" … Why?

" The patient's record did not contain all the information the doctor needed" … Why?

" The doctor's assistant had not entered the patient's latest test results" … Why?

" The lab technician had phoned the results through to the receptionist who forgot to tell the assistant"

The root cause is the absence of a formal system for recording test results. A new system could guard against this in future

TOOL: LOOK OUT!

There's an art to watching people! Use this tool when you're following a journey yourself, accompanying a customer, or taking a trip into the customer's world. Note down what you observe and use your notes to guide you when constructing your map.

TOOLS

"LOOK OUT"
Observation Tool

Find an appropriate vantage point where you are able to watch events without being caught up too closely in them.

Be prepared to be patient. The more time you take, the more you'll get from the exercise. Think about the BBC photographer who spent three years in Siberia to shoot three and a half minute's broadcast footage of a snow leopard. No need for quite such extremes here, but put in the time you need!

Visual clues that can help you understand journeys better

- Are people alone or with others?
- How fast are they moving? Are they hurrying, dawdling, impatient?
- What are they wearing and carrying? Impact on the journey?
- Are they doing anything else (talking on phone, listening to music, reading)?
- What do they stop or pause, and why?
- What do they notice/look at/read? Do they see signage?
- Who do they talk to? In what way? Animated, anxious, confident?
- What's their demeanour/body language?
- What changes as they go through the journey? What are the triggers?

Customer Experience Mapping

GREAT FOR

- ✓ Gathering clues from a lot of people
- ✓ Learning about physical journeys
- ✓ Identifying the impact of things like signage & queue management

WATCHOUT

- Doesn't replace listening – the two things work together
- Don't risk being taken for a peeping tom! Keep the observation public and don't zoom in on one individual
- Don't ever record, film, or photograph people without permission

HM Government

CASE STUDY: HOLLOWAY PRISON

HMP Holloway was seeking to improve communications with arriving women prisoners. Induction and settlement procedures weren't helping women escape difficult circumstances, and incidences of self harm and even suicide had occurred in the period following admission.

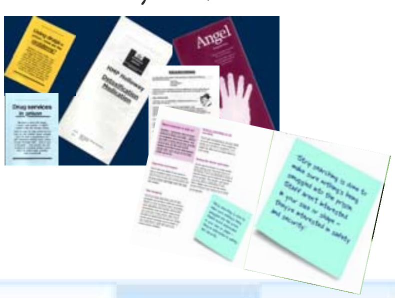
Customer Experience Mapping

Journey mapping was carried out amongst both prisoners and prison staff to understand the process from each point of view. Focus groups were held with prisoners and they kept diaries recording how they felt as they moved through the system. Prison officers went through the admissions process themselves, to build understanding of what prisoners experienced.

A number of changes were made as a result. There were new initiatives to explain the system to arriving prisoners, and a buddy system was set up, where trusted existing prisoners spent time with new ones. Together the changes have had a real impact on the state of mind of incoming prisoners, improved the chances of rehabilitiation and contributed to reduced rates of self-harm.

HM PRISON SERVICE

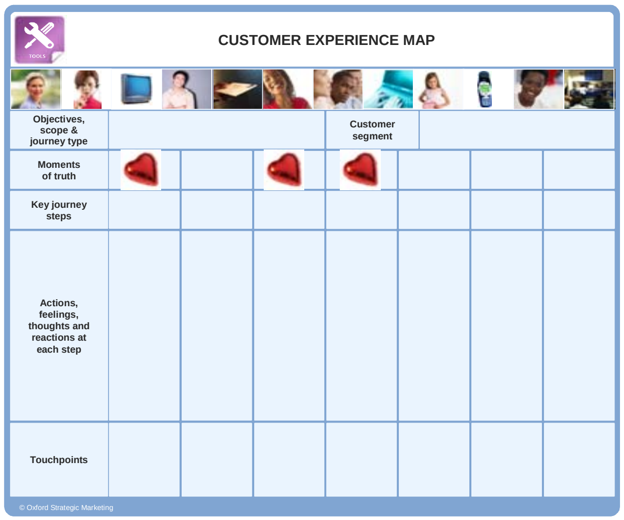
One of the outcomes from the exercise was a redesign of materials given to incoming prisoners. Fifty separate, text-intensive documents were replaced by a much simpler, more accessible induction pack.



Type of journey	Travelling from court to Holloway Prison							
Hot spot	♥					♥	♥	
Journey steps	Leave court	Travel to Holloway	Checked in from van	Rub-down search	Photo and ID	Access to phone	Strip search	Taken to cell
Experience at each step: •actions • thoughts • feelings • reactions	Shock and realisation Want to get in touch with people but can't Told what to do, no freedom of action	Uncomfort-able No one to reassure me Tired, dirty, don't know what's going to happen	De-personalised Being processed through the system No turning back – I'm really here	Don't know what they're looking for Shaming – no privacy	Again feel I'm being processed Suddenly I'm a number, not a person	I can make a call, but what am I going to hear? What's happening to my children/ family? What are they thinking about me?	Feel dirty and ashamed – haven't been able to wash for two days Why are they doing this? What are they looking for? What do they think of me?	I've really reached rock bottom. What are the other people in here going to be like? How will I be able to cope?
Key Issues/ opportunities	Explain process at this stage	Talk to people on the journey	Tell people about admissions	Explain why it's being done	Explain what ID number is for	Information about what's happening to family	Explain why it's necessary	Someone to stay with you for first hour

CONSTRUCTING THE MAP: INTRODUCTION

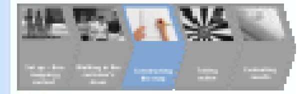
Having carried out your mapping event, you can now move on to filling in the rest of your customer experience map. The following slides describe how to do this. Usually this is best done by a team of people in a mapping workshop – at the end of the section we describe how to run one.



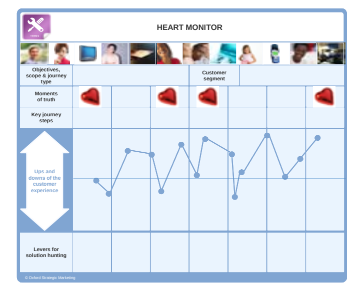
You should have filled in the top boxes of the map in the set-up stage.
In this stage we'll cover how to fill in all the remaining parts of the map.

A few simple principles for filling in the map:

- The starting point must always be the customer. Forget the internal perspective –stand in the customer's shoes
- Understand deeply people's thoughts and feelings as well as their actions. A customer experience map isn't just about what people do – it's also about understanding why they do it
- Write in everyday customer language and avoid internal terms or jargon
- Be realistic in the steps you choose to map. In a detailed process with many steps, try to focus on the important areas rather than getting lost in unnecessary detail



It often helps to map not just what happens now, but also the 'Ideal' journey that you'd like customers to take in the future. See page 46 for details.



As before, this section focuses on the customer experience map as shown on the left. If you are constructing a heart monitor, you'll follow the same basic steps but see Section 5 for detailed notes on filling out the map.

Customer Experience Mapping

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

Step 1: Confirm the journey and customer

- 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
- Ensure definitions of these are clear and that everyone has a common understanding of them

Step 2: Identify key journey steps

- 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
- 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
- Ensure you're clear which channels people use at each step

Step 3: Actions, feelings, thoughts and reactions

- For each step, and **taking the customer's viewpoint**, write down what they do and how they think and feel
- Write this in the everyday language customers use – put it in their own actual words where possible
- Say what people's emotions are and how strongly they're felt
- Use emotive words – they help bring people to life

Step 4: Touchpoints

- 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
- Think about physical interactions (e.g. buildings), human contact (face to face or remote) and communications

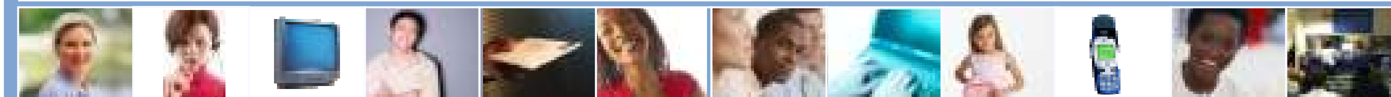
Step 5: Moments of truth

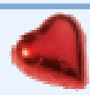
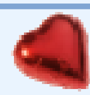
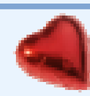
- Now, looking at the whole journey, identify the moments of truth
- These are the key points in the journey where customers may pause and evaluate the experience, or make a crucial decision
- Aim to be discriminating here – don't be tempted to label every step as a moment of truth!

HM Government

BORDERS AND IMMIGRATION AGENCY EXAMPLE

CUSTOMER EXPERIENCE MAP



Objectives, scope & journey type	Applying for entry clearance to the UK			**Customer segment**	Short-term student from China (Sichin)		
Moments of truth							
Key Journey Steps	Finds information	Application submitted	Payment processed	Query from UK Visas received	Receive interview request	Biometrics and interview	VISA received
Actions, feelings, thoughts and reactions at each step	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
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 acknow-ledgement	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

Customer Experience Mapping

Sichin

This is based on an actual example of mapping done by the Borders & Immigration Agency. It's been reworked into the formats used in this guide.

HM Government

Customer Experience Mapping

If, as a result of this review, you change your view on the journey or customer definition, amend your initial maps to reflect new descriptions. Consider whether you need to do any further mapping work at this stage.

Now is a good time to go back to and expand on the customer pen portraits you drafted earlier (see the example in the online toolbox if you want to know more).

STEP 1: CONFIRM THE JOURNEY AND CUSTOMER

Now that you've researched your customer journey you need to go back to the broad definitions of customer and journey that you established in the set up stage to confirm that you got it right at that point.

Confirm the journey

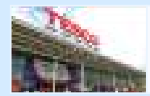
- Does your description of the journey match the way that customers talked about it, using their language?
- Does it cover all the key parts of the customer's interaction with government on this issue?
- Based on your learning from customers, are you clear that this is best mapped as one single journey? Sometimes you need to map more than one (see example on the right)
- Have you got the right start and end points for the journey? (see opposite page)

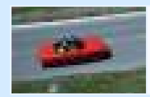
Confirm the customer

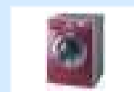
- Based on your journey research, are you confident that the customer groups you identified are the right ones?
- Are there shared needs, behaviours and attitudes within the groups? Are the groups distinct from one another?
- If you prioritised any groups earlier, was this prioritisation confirmed by the research? Are there any other groups that you should be treating as priorities?

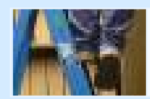
CLIMATE CHANGE

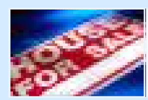
On complex subjects you may want to map more than one journey. Looking at how to communicate with people to get positive action on climate change you may consider multiple journeys, e.g.


Planning and doing a weekly supermarket shop


Getting about every day


Running the home daily


Home maintenance


Buying a new home


Planning a big holiday

HM Government

They mapped six journeys:

STEP 2: IDENTIFY KEY JOURNEY STEPS

Don't think about journey steps in terms of the contacts that customers have with government - base them on the journey as they define it. It's particularly important to think about when a journey starts and ends.

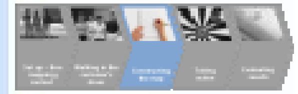
Be careful about the number of steps you use; 6-10 is ideal. In simple journeys with few steps, challenge these to see whether any have component parts that could be broken out. In long, complex journeys focus on the key steps; points where emotions run high, decision points, points where the cost (to the customer) is high and 'baton-change' points between departments.

It can help to think about the experience in the three stages shown on the tool below:

TOOLS

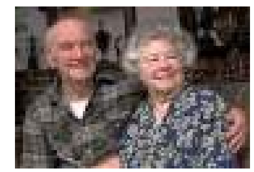
JOURNEY STAGES

Start point	Journey process	End point
■ Is there a phase that's invisible to government before you become involved? ■ Are other departments involved before your own? ■ What are the entry points in to this journey? Do customers choose to enter in to the journey or are they propelled in to it? ■ Do you need to create awareness as a first step before the actual journey begins?	■ Have you considered all the contact points that customers might have during the journey process, not just with your own department but across government as a whole? ■ What is the impact of outside influences beyond your control that might affect the journey? ■ Does the journey depend on, start after, or lead into any other experience that should be included?	■ Distinguish between points where customers might choose to drop out of the journey and the actual end of the journey process ■ Think about whether the journey might lead to 'customer remorse' – emotions, doubts, insecurities or dissatisfaction that needs tackling and therefore should be included in the journey



CASE STUDY

DWP found that the journey for older carers begins long before people start receiving benefits – the point at which they are officially recognised as carers.



CASE STUDY

When mapping the mortgage process, financial service providers may end the map at the point the mortgage is paid off and beyond – which may be a journey of 25 years.

The resulting 'empty nesters' may be ripe for buying a second or retirement home so the journey may not even end there!

HM Government

Customer Experience Mapping

STEP 3: ACTIONS, THOUGHTS & FEELINGS

When you are clear on your journey steps, enter them onto your map in sequence. You're now ready to go on to filling in the heart of the map – the actions, thoughts and feelings that people experience at each step.

As you map, never lose sight of the customer. Keep reminding yourself to stick to an external perspective and don't use 'internal' knowledge to fill in any content.

If you really don't know how a customer feels at a given point, don't make it up. Ideally go back to the customers or staff who did the mapping and find out the information you need. If that can't be done, and the missing information isn't crucial to the process, log it as a gap in your understanding to be tackled as an action point coming out of the process.

HINTS & TIPS

It isn't a great customer experience map unless…

… it truly brings the customer to life

… it's build on a deep understanding of thoughts and feelings

… it's clear and easy to follow (no jargon!)

… it engages people in the issue

… it's totally unambiguous.

HINTS & TIPS

The action steps you record don't have to simply be black words on white paper. Don't necessarily stick to an A4 page – you can use much larger maps and make them highly visual. Include photographs and verbatim comments if they help. The output shouldn't be academic – it should engage and inspire.

Example step: Tax credit applicant receives notice to repay overpayment

Initial reaction of shock, followed by anger and despair. Real fear of the consequences – no money for Christmas this year, could even lose flat

"I can't believe they can be this incompetent"

CASE STUDY

DWP Department for Work and Pensions

When DWP carried out their work mapping carers' journeys, they carried out initial interviews on which to base their maps. Then, following work to set out the key journey steps, they went back to the carers and reviewed the steps with them to ensure that they truly reflected their actions, thoughts and feelings at each point.

STEP 4: TOUCHPOINTS

A touchpoint is a point in the journey where you have some sort of interaction with the customer. It's an opportunity to explain things and improve the experience.

HINTS & TIPS

- Remember that all interactions are touchpoints:
  - Physical interactions (buildings, car parks etc
  - Human contact (reception staff, call centres, frontline teams)
  - Communications (advertising, websites, literature)
- Not all touchpoints have the same impact – think about their relative importance

WATCHOUT

- Think about touchpoints from the customer's point of view. To him or her, contact with any government department is a touchpoint; don't just consider your own points of contact
- Just because you make a service or information available doesn't mean the customer has seen it. Only count things that are touchpoints from the customer's perspective

CASE STUDY

The 'Tell us once' project is looking to reduce the number of times that people have to contact government to report a change of circumstance such as a birth or a bereavement.

In doing this, the project team have identified and mapped touchpoints that span people's whole experience of government – not just one part of it. The objective is to remove the unnecessary touchpoints, that put an extra burden on the customer, but to make sure that the touchpoints that remain are enough to guarantee that customers continue to get the information and support that they need.

Understand the opportunities touchpoints open up for you. Good use of them can improve the journey for customers and make it smoother and more cost-effective for you.

Customer Experience Mapping

Focus your actions around moments of truth, to maximise impact on the customer and help you target limited resource to where it will have most effect.

STEP 5: MOMENTS OF TRUTH

Moments of truth (also called "hot spots" or "voting points") are key points in the journey where customers may pause and evaluate the experience, or make a crucial decision (e.g. whether to stay or go). Get it wrong here and you can lose them, but it's also the point at which you can make the strongest positive impression.

You can usually identify moments of truth by thinking about what people focused on during the mapping event, or what they felt most strongly about during interviews.

HINTS & TIPS

- Try to limit the number of moments of truth you identify to no more than 3 or 4 per journey so that you focus your attention on the most important areas
- Choose the really pivotal points where key decisions or choices are made – not simply the steps that are most complex or take longest

WATCHOUT

- Moments of truth may not be the same for each customer segment. Plot each segment separately
- Even though it's right to focus on moments of truth, don't forget other parts of the journey. There may be quick wins elsewhere

Think about moments of truth from your own experience…

- When you pressed 3, then 4, then 2, held for 5 minutes, then got transferred and finally got an engaged tone when calling to pay your phone bill
- When you queued for 20 minutes to get a passport application form at the post office, only to be told you could download it from the internet
- When you completed the insurance application form online, then received a telephone call going over all the same questions

How did you feel?

HM Government

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

ON-LINE CONTENT

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 ALSO

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?

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

WATCHOUT

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

Customer Experience Mapping

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 hugly engaging experience for them, and result in transformational journey maps.

HM Government

Customer Experience Mapping

Be creative!

By all means use the agenda here as a base, but don't be afraid to add or substitute your own ideas.

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

Introduction and ice breaker	**15 mins**
Setting the context ■ Project background and journey mapping principles ■ Objectives for today	**30 mins**
Getting to know your customers better ■ Share research and inputs from mapping event ■ Cover each segment (where applicable)	**60 mins**
Defining the journey ■ Agree definition including start and finish points	**15 mins**
Build journeys (see approaches on the right) ■ Build journeys for each key segment ■ Work in groups as necessary	**60 mins**
Share outputs	**15 mins**
LUNCH	
Reprise morning work to ensure shared understanding of all journeys	**30 mins**
Identify touchpoints and moments of truth ■ Work in groups as before	**30 mins**
Share outputs	**30 mins**
Identify opportunities to make changes ■ In groups as before, focused against key objectives ■ Think about how to implement and monitor	**60 mins**
Share outputs	**30 mins**
Agree next steps and close	**15 mins**

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 compete 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.

TAKING ACTION - INTRODUCTION

Developing a set of customer experience maps is not the end point of your process, it's just the beginning. The most important part of the whole exercise is what you do with the maps to improve or transform the customer experience.

There are a number of steps you need to go through when planning actions:

- Go back to the context checklist from the set up stage, and remind yourself how you intended the maps to be used and by whom. Keep sight of your objectives
- Think about what the 'ideal' journey might look like in comparison to the one that the customer experiences now (see following page)
- Plan how you can move towards the ideal. Don't just look for incremental improvements – spend time thinking about the opportunities for truly innovative solutions
- Plan how to engage other people in the work you have done. You should have been seeking stakeholder involvement right from the set up phase, but now's the time to really sell in what you've done and engage people in it

HINTS & TIPS

Action areas to think about:

- The products and services you offer
- People and delivery
- Environment
- Channel
- Communications

CASE STUDY

h&f putting residents first

Hammersmith and Fulham Council combined sophisticated CRM systems with customer journey mapping to transform their customer access strategy.

Transactional services were completely reorganised into one department, run by a new 'Residents Direct' team. The new operation combined front and back office with slick phone and web services.

Simple transactions were directed to the web, whilst face to face interaction was focused on the relatively limited number of people who were identified as really needing help.

Customer Experience Mapping

Identifying touchpoints and moments of truth will have helped show where you need to focus your efforts and resources. Use them to help plan actions. Think here, too, about whether you know enough about the how the system works – it there value in mapping the system too?

HM Government

Customer Experience Mapping

You may have already talked to customers about the ideal journey. If not, hypothesise it based on the highs and lows that are experienced now and test it, ideally with customers but otherwise with frontline staff or others involved closely in the mapping process.

DEFINE THE IDEAL JOURNEY AND IDENTIFY GAPS

Defining the ideal journey can be a powerful way of helping to drive out possible actions. By comparing the current with an 'ideal' experience it's possible to identify where gaps exist between the two, and these can become the focus for your actions.

TOOLS

Moments of Truth Checklist

Complete this for each moment of truth to identify changes that need to be made:

Moment of Truth	Current Experience	Desired Experience

It's often particularly helpful to focus your efforts on moments of truth, these being the points at which customers are most likely to form strong opinions and make decisions about whether to stay with or leave the process.

The moments of truth checklist on the left is a useful tool to use here.

CASE STUDY

HMRC mapped the customer experience to look at current and ideal experiences of PAYE. Mapping the two side by side, they identified where the greatest gaps lay, and used the analysis to generate ideas for short, medium and long-term improvements to the service.

The short-term focus was on using comms to give the customer more and better information so they knew what to expect of the system and where to go for help. Meanwhile, initiatives were put in place to simplify the customer interface, so improving the experience. The final, longer term, actions aimed to simplify the product and process in order not just to improve but to transform the experience.

HM Revenue & Customs

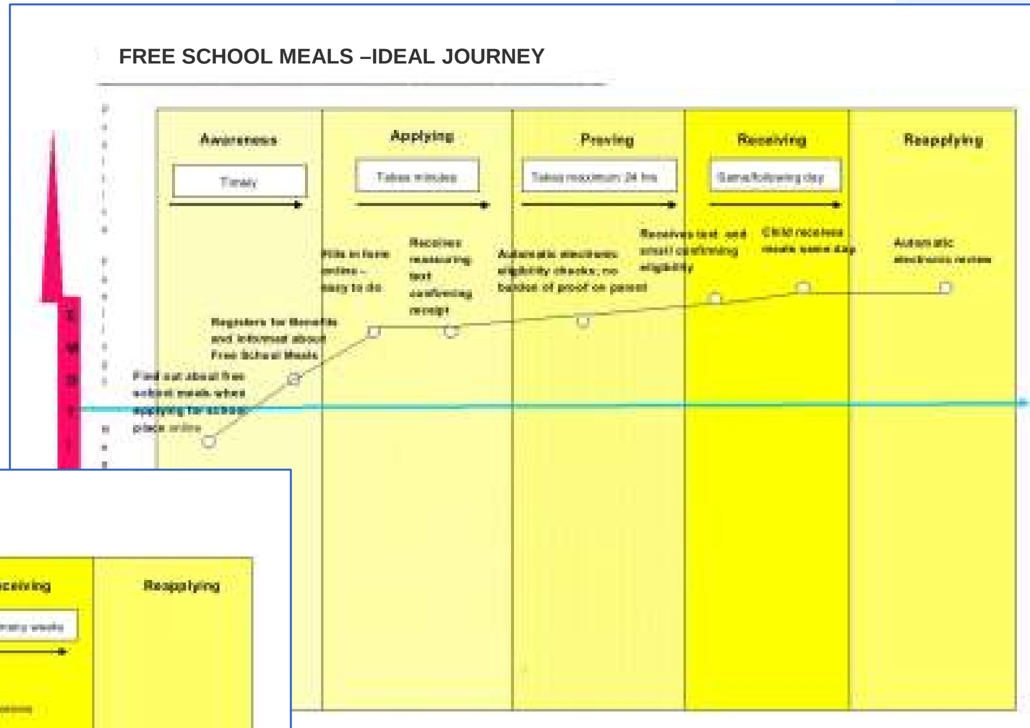
CASE STUDY

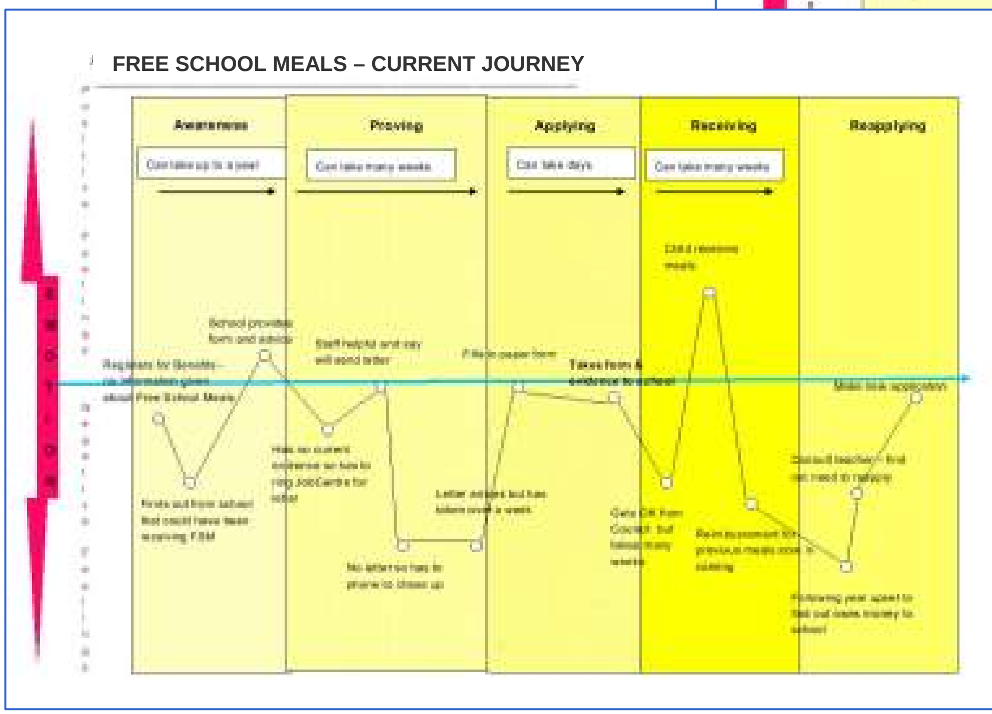
EXAMPLE OF COMPARING A CURRENT AND IDEAL EXPERIENCE

Tameside Metropolitan Borough

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.





Customer Experience Mapping

HM Government

"After we'd done the mapping, the issue was what to do with it. If we were doing it again now we'd engage people earlier on and think about actions from the start"

Customer Experience Mapping

When you're creating an action plan, try to think of both shorter-term, practical things you can do right away, and also the 'big wins' that you may be able to achieve in the longer term. Don't let current practice constrain your thinking – be prepared to think big, challenge and stick to your guns!

IDENTIFY PRIORITY ACTIONS

Coming up with clear, specific actions is absolutely central to the customer journey mapping process. Maps that people find interesting and then put away on a shelf somewhere are never going to transform the customer experience.

Use the analysis you have done so far (touchpoints, moments of truth, gap analysis) to identify where the greatest need for action lies.

Think about what you can do in the short, medium and longer term to address issues raised (the prioritisation tool on page 76 in Section 4 might help here).

Then think about the tangible steps you need to take and create an action plan, using the normal common-sense principles:

- Be clear and specific
- Put time limits against actions
- Assign specific responsibilities
- Indicate targets and how progress will be measured
- Be realistic in terms of what you expect in what timeframe.

Never lose sight of the need to carry staff with you and to establish wider buy-in across the organisation.

CASE STUDY

Ministry of JUSTICE

Within the Ministry of Justice, HMCS mapped how jurors, witnesses and victims of crime felt whilst going through the court system.

Findings were communicated throughout the organisation using interactive workshops, and an action plan was worked up as a formal project with work-streams that included:

- Improving the front of house experience to create better first impressions of court
- Better call routing to the appropriate contact
- Improving staff knowledge
- Facilitating better dialogue with judges
- Improved information for witnesses on what to expect in the court process, provided in DVD format.

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.

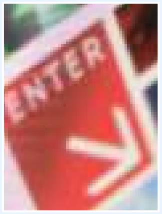
Identify the lever(s) that will have the biggest impact, and specify where you will use them to improve the customer experience. Think from the customer's perspective and think in terms of joined-up services, not silos.

TOOLS

LEVERS FOR IDENTIFYING ACTIONS

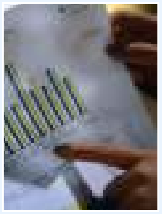
Product / Service
Does it meet customer expectations and deliver on their needs? Are your services joined up with those of other departments?

Proposition
Is your proposition clear, engaging and motivating?



Channel / Environment
Can customers easily access your product / service? Are they made to feel welcome?

Communication
Do you have a strong voice with your customer ? Are you communicating in the most effective and compelling way?



Value Provision
Are there areas where you are over-delivering (or duplicating) or under-delivering and failing on your proposition?

Partnerships
Are you working with the right partners in the right way? Are you and your partners consistent in your service delivery?

Customer Face
Are your customer-facing colleagues effectively briefed, and are they delivering to required standards?

Process
Is the process smooth with easy transitions? Are customers satisfied with the experience you provide?

Reputation
Do your customers recognise who you are and what you are there for? Are you distinct in what you offer?

Customer Experience Mapping

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.

Customer Experience Mapping

EXAMPLES OF TAKING ACTION

TAKING ACTION

<table>
<tr><th>TYPE OF JOURNEY</th><th colspan="2">EXAMPLES OF ACTIONS YOU MIGHT TAKE</th></tr>
<tr><td>Actual
A literal, physical journey; e.g. prisoners being taken from court to prison</td><td>■ Identify most appropriate times and ways to deliver information & messages
■ Improve the environment at key points
■ Train staff to recognise and respond to moments of truth</td><td rowspan="6">■ 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</td></tr>
<tr><td>Transactional
Going through a process with fixed steps, e.g. applying for free school meals</td><td>■ Establish new channels so that customers can access government more easily and efficiently
■ Look for ways of reducing journey times
■ Remove duplication from the process</td></tr>
<tr><td>Experiential
An ongoing experience of a service or linked services, e.g. using the Health Service</td><td>■ Build staff engagement and empathy for customers
■ 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</td></tr>
<tr><td>Emotional
A ‘mental’ journey that is experienced over time e.g. going through a separation and making arrangements for children</td><td>■ Identify priority customer groups who need most help
■ 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</td></tr>
<tr><td>Relationship Building
The development of a relationship with government over time; e.g. a business customer working government to grow a business</td><td>■ Establish ongoing communication channels with low cost to serve
■ 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</td></tr>
<tr><td>Rite of Passage
A major life change or lifestage event that can cut across many parts of government, e.g. bereavement</td><td>■ Link systems to reduce need for multiple contacts from the customer
■ 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</td></tr>
</table>

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.

SELLING IT IN

A vital part of taking action is developing a strong sell-in to the rest of the organisation. This is vital if a really transformational experience is to become a reality.

Think widely in terms of who you want to communicate to in the selling-in process. Think about all stakeholders, and be sure to include both senior managers and front line staff. Tailor your communication to the audience, both in terms of what you say and how you say it – senior managers will want to know results and implications and front line staff are likely to need more detail to get to grips with the issues. Both will welcome presentation styles that bring the issues to life, and journey mapping is ideally suited to this.

Selling it to staff

- Encourage staff to look at what they do from the customer's perspective
- Give very clear reasons for any actions that are being taken, based on the customer experience
- Ensure staff are aware of all internal input to the process (e.g. in putting the maps together)
- Present things as visually and engagingly as possible – win hearts and minds

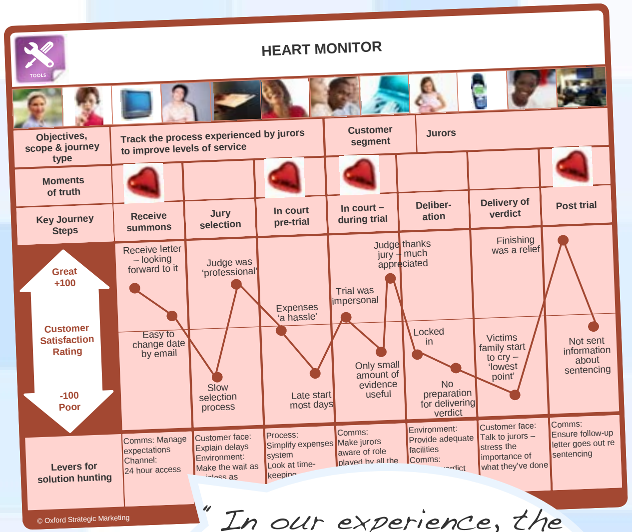
Getting wider buy-in within the organisation

- Ensure that journey mapping is seen as a means to an end, not an end in itself
- Focus on the outcomes you will achieve
- Don't overclaim in terms of what mapping can and can't do – let the understanding speak for itself
- As with all staff, make it visual and engaging

When presenting journey mapping to a senior group of managers, HMRC used actors to bring customer experiences to life.

" We used actors to highlight that there really is a customer."

Customer Experience Mapping



" In our experience, the heart monitor has been by far the most powerful way to get top management (and Ministerial) attention"

Robert, G and Bate, S.P.(2006) Piloting, Testing and Evaluating Experience-based design (EBD): key findings and lessons for the future. London. University College London

Customer Experience Mapping

"..it was the patient taking the interviewer through every stage of his or her journey, ... sometimes passing over points in the journey which we and staff had expected to be important, and at other times focusing on things which to us seemed almost minor or trivial but which to them had major symbolic significance"

CASE STUDY: LUTON AND DUNSTABLE NHS TRUST

Luton and Dunstable NHS Trust, working with the NHS Institute for Innovation & Improvement, have pioneered a new approach to service improvement, using 'experience-based co-design' to involve patients as co-designers of new products and services.

Patients and staff worked together to identify key touchpoints that had shaped their personal experiences of the head and neck cancer service.

Observation and staff interviews were followed by interviews with patient volunteers and carers. Customer journeys were mapped, focusing on the emotions experienced by the patients and the touchpoints that were identified, and these were superimposed on a chronology of events.

This enabled the team to prioritise and implement a total of 43 service improvements, relating to efficiency (e.g. better throughput of patients at clinics), patient safety (e.g. expanding staff competencies) and experience of the service (e.g. better environment and more choice about treatment).

There were also unexpected knock-on effects as, for example, other outpatient clinics made changes based on the experience of the head and neck clinic.

Key success factors identified as a result of the study:

- Maintain a high profile for the project in the organisation
- Invest significant time with patients up front to help them understand the process and their role
- Use different tools to give patients a range of ways to get involved
- Allow patients and staff space and time to talk about their personal experiences
- Use an independent third party to observe and feed back to staff on existing services
- Have a local improvement specialist with dedicated time to co-ordinate the work
- Actively engage relevant clinical champions and gain senior executive support
- Use films to bring the stories to life
- Plan ahead for each successive phase by recruiting new participants (this also facilitates benchmarking to see whether the experience has improved)

EVALUATING RESULTS

Right at the start of the journey mapping process, in the set up phase, one of the actions was to ensure that you set clear, measurable objectives. This is the point at which you need to go back to these and test how well you are performing against those.

There are two main ways of doing this; you can compare changes in your own service over time or you can compare yourselves with other similar organisations. This is called benchmarking.

Benchmarking over time

In most cases the best method to use, because you can make a direct comparison of where you are now with where you were.

You can look at whether customer journeys have changed, in terms both of the journey steps and also thoughts, feelings and emotions along the way.

To do this, you need to ensure that the way you collect information or ask questions when benchmarking is consistent with the original exercise. You can use the same individuals if it's a journey they go through more then once; otherwise aim for a matched sample of similar people.

You also need to think about timing – allow enough time between the two exercises to allow actions to be implemented and take effect.

Benchmarking against others

If you choose to benchmark against others, you need to identify a service that is directly comparable with your own.

This may be possible – a good example would be local government bodies facing similar issues to one another. However, you need to be careful – obviously it's hard to compare a wealthy London borough, with a much poorer rural one.

SEE ALSO

Section 5 of this guide gives more practical and detailed information about how to go about measuring the customer experience.

“ …if the administration… could be simplified then this would make a big difference. All those different declarations amount to loads of red tape”

Customer Experience Mapping

The administrative burden is defined as: “the number of hours required for citizens to comply with their obligations to provide information as a result of legislation and government regulations”.

For more information, see the following website, which is in English: www.whatarelief.eu

HM Government

CASE STUDY: REDUCING THE ADMINISTRATIVE BURDEN ON CITIZENS IN THE NETHERLANDS

In the Netherlands, as in the UK, improving service to citizens is a central part of government policy. A key objective is to reduce the administrative burden placed on citizens.

Work was undertaken in 2003 to understand the effect of this administrative burden on a range of different people. Some groups, such as older people and carers, were found to have a disproportionately high numbers of interactions, and to give more insight into these burdens the journeys of these groups were mapped.

The experience of government (both local and national) of all groups was tracked across seven areas: identity, education, health, work and income, housing, mobility and ‘general’. A calculation was then made of the total amount of time this represented over the course of a year.

The government set itself the target of reducing the administrative burden across all groups of people of 25%, through a combination of existing and new initiatives. The government tracked the same journeys again at the start of 2007 to work out what reduction, if any, had been achieved.

MARIA

“The Dutch language enables me to come into contact with other parents more easily”

Single mother on welfare

“My Dutch has improved tremendously”, Maria says. She will soon take the NT2 exam. After the naturalisation course she seriously continued to further study the Dutch language. “Three times a week”, she explains, “and the city offered to pay for it.” Her main incentive is the fact that she reall wants to know what her son Ramon is learning at school. “I think it will be fun to be able to help him with his homework in the future. I want to experience his development from up close. The Dutch language enables me to come into contact with other parents easier”, Maria adds.

Maria feels a little more confident when dealing with Social Services. Her municipality as of recently works with mutation forms instead of forms for eligibility inquiry forms. This means that Maria only has to report changes to Social Services. She understands the forms much better now and does not constantly have to ask others for help. Also people recognise that she currently has reached the limits of her reintegration project. With a weekly three day segments- course on top of the care for a small child it is not necessary at the moment to enter another project at this time. “By the time I am ready for it.”, Maria explains, “the child day care for Ramon will be well taken care of and the compensation for it will be much easier to apply for. I will have a better command of the language which will make me to feel less lost.” Maria continues “and I will not be needing treatment to make itby myself. When you get into a situation where you are alone in a strange country all the pillars under your existence are removed” Maria says. “Family, work, staying permit status, everything becomes insecure and nothing is guaranteed. The people at RAGG and CIZ helped me tremendously to get through that difficult period. Slowly but surely I am getting back on my feet again”, Maria concludes.

Across all citizens, the administrative burden has now been reduced by around 23%. Results for the specific target groups ranged from a 14% time reduction for the parents of a disabled child, to 39% for a single mother on welfare. A ‘median family’ included in the study saw a reduction in time of 16%.

The study has given clear indications of where progress has been made, by customer group and by service area. This in turn has given clear guidance on where to focus the next set of initiatives.

Section 4

Mapping the System

HM Government

INTRODUCTION

Also known as process mapping, mapping the system is about creating a graphic representation of all the steps, actions, interactions and decision points of a process in order to understand it and thus identify opportunities for improvement.

In this section we describe how to map a system, combining deep understanding of the customer experience with the practicalities of the system or process they encounter, and moving through to taking action and evaluating results.

There are five steps in the process:

'Mapping the System' is great for:

- Sharing what the current process looks like
- Showing relationships between steps and other departments involved
- Identifying deviations from the norm – where do things go wrong?
- Identifying duplication and other inefficiencies
- Identifying how and where things can be improved (and where further investigation is needed)
- Comparing the view of staff with the view of customers – you can do two maps and look at the differences between them
- Training – showing how things should be done
- Serving as process documentation and setting standards

Your first draft of a system map may well be made using internal staff rather than customers. This can then be compared with a map drawn up with the help of customers to identify the gap between your assumptions and their experiences.

Mapping the System

This section describes the second mapping approach and sets out steps and tools to help.

Core tools are included in this guide but there are more in the online toolbox.

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WATCHOUT

Take care that you start by mapping the system as it really is, not as you'd like it to be.

Mapping the System

The basic tool for Mapping the System is shown here. As you read through this section, we'll take you through how to build your own map. First, however, we need to cover the set-up phase where you will consider the context in which you will be mapping.

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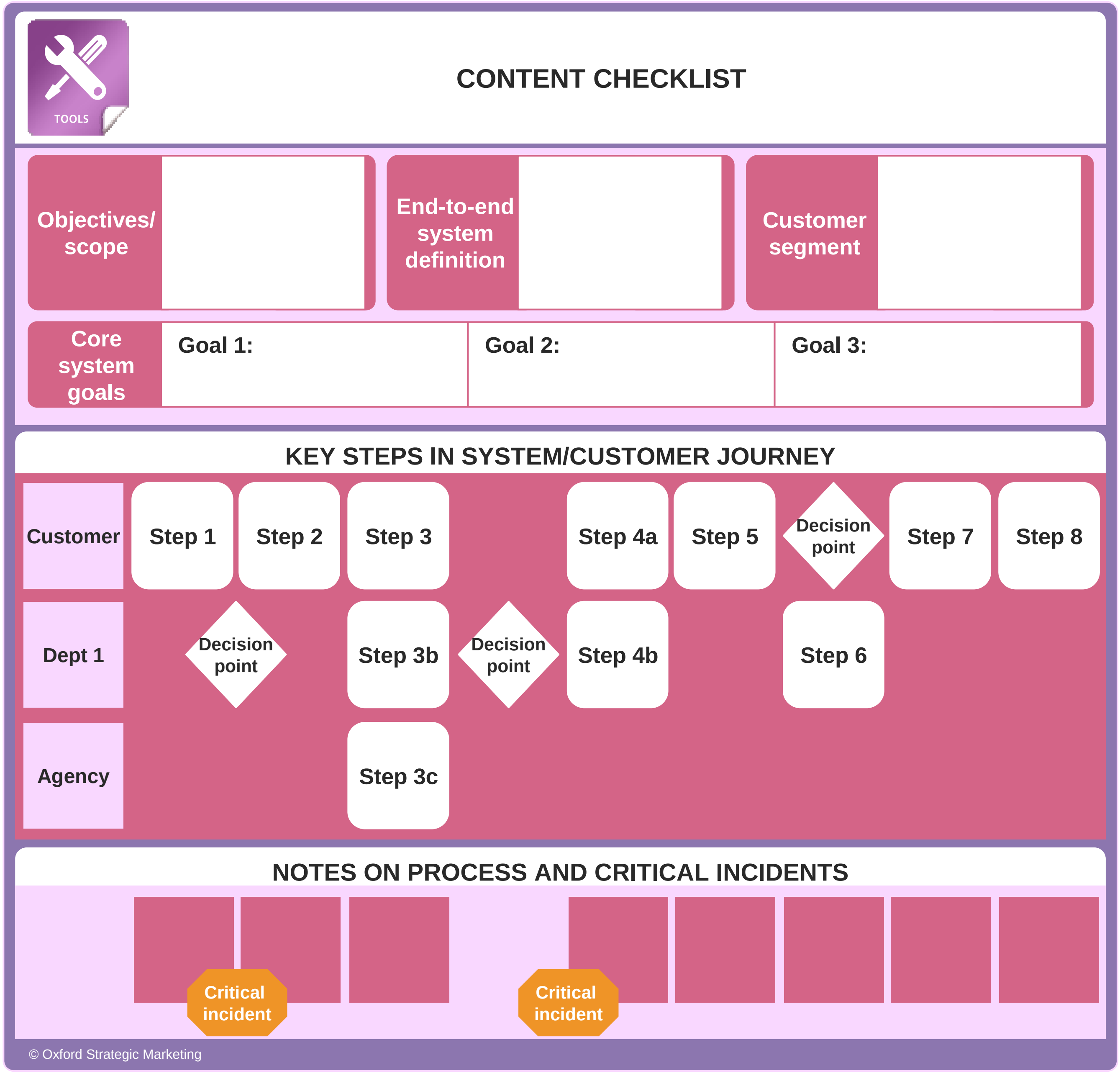
THE SYSTEM MAP



SET UP: THE CONTEXT

As with any journey mapping, as a first step you need to clarify the context. This tool differs slightly from the one given in Section 3, to reflect the different type of mapping that you are doing.

TOOLS

CONTEXT CHECKLIST

Who will use the maps?

- Identify key users, current expertise and knowledge or use of system/process maps ☐
- Agree how these key users will be involved in the process ☐
- Identify additional stakeholders and agree how they should be involved/informed ☐
- Ensure everyone is clear and aligned in their expectations of the process and outputs ☐

How will maps be applied?

- Confirm what the maps will be used for and the level of detail/robustness required ☐
- Be clear whether you need to quantify the steps in the map in terms of, for example, costs incurred or time taken ☐
- Ensure you have set clear, measurable objectives ☐
- Are you also mapping the customer experience? If so, how will you consider the two maps together? ☐

What is the scope?

- Confirm the budget and timescales ☐
- Agree how and when other departments and agencies should be involved ☐
- Audit your knowledge of the system – how much do you know already? ☐
- Make an initial plan of the approach, process and anticipated outputs ☐

Mapping the System

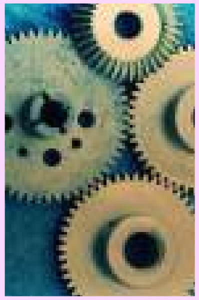
At the start of mapping, you need to be clear about three things that set the mapping context – the who, how and what.

Mapping the System

Precise definitions of the system and the customer may change after customer input, but you need to be clear at this stage about the parameters within which you should be working

SET UP: INITIAL ISSUES TO CONSIDER

In the set up phase you need to put together an initial definition of the system you're mapping and the customer group or groups you need to focus on. You also need to think about who else might be involved.

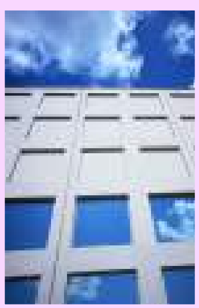


What's the system/process?:

- Clearly identify the end-to-end system or process you are mapping, taking particular care to define clear start and end points based on both the internal view and also the external customer one
- Think about whether you are building on an existing system or whether you need to develop a new one from scratch. If it's a new system you **have** to walk people through the process – don't make assumptions about how they behave
- Try to avoid over complexity. Large systems can be broken down into component parts and reassembled later

Which customers?

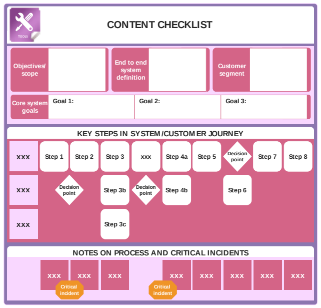
- For system mapping you don't usually need to segment and identify different customer groups unless they have a genuinely different **experience** of the system, as opposed to **response** to it.
- However, if you do need to segment customers, see page 25 in Section 3 for notes on segmentation and where to find out more about it



Which other departments?

- Identify all intermediaries, departments, agencies etc. involved and ensure you have the ability to get input from all of them in building your map
- Pay particular attention to 'baton-change' points where departments interact
- Think broadly and think from the point of view of the customer. Customers don't necessarily recognise departmental boundaries and may consider contacts and communications from other areas of government to be part of the process you're mapping
- Recognise the impact of:
  - Both local and national government
  - All 'government' communications from letters to websites
  - NGOs such as Citizens' Advice Bureaux or charities like Age Concern

SET OUT THE MAP(S) YOU WANT TO COMPLETE



Having defined your context, you can fill in the headers on your system map or maps:

- Objectives/scope
- End to end system definition
- Customer segment
- Core system goals.

Make sure you map it as it is in reality, not in theory.

MAP COMPLETION CHECKLIST

TOOLS

Objectives/scope	■ State overall objectives of the mapping exercise	☐
	■ How and by whom will the maps be used?	☐
End to end system definition	■ Clear statement of what you're mapping, with start and end points	☐
	■ Is this an existing system or a new one?	☐
Customer Segment	■ All customers or a specific segment?	☐
	■ Include brief description	☐
Core System goals	■ What are the specific things you want to achieve?	☐
	■ Have you set clear, meaningful criteria for success?	☐
How many maps?	■ Are you mapping one system or more?	☐
	■ Are you mapping the current experience and/or the ideal one?	☐
	■ Will you be comparing the view of staff with the view of customers?	☐

Mapping the System

Once you have set out your maps, the next step will be to pull together the information and inputs that you need in order to complete the rest of the maps.

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GREAT EXAMPLES OF MAPPING THE SYSTEM

These are great examples of where good up-front planning resulted in successful outcomes from system mapping.

Mapping the System

ROYAL BOROUGH OF KENSINGTON AND CHELSEA

CASE STUDY

THE ROYAL BOROUGH OF KENSINGTON AND CHELSEA

In a drive to build customer focus, the Royal Borough of Kensington and Chelsea undertook initial customer segmentation work, and are now in the process of realigning their services and IT, based on a better understanding of who their customers are, what they need and which are their preferred access channels.

Consultation and a predictive understanding of customers, based on segmentation, revealed customer dissatisfaction about parking services (to renew parking permits, the system required people to come to a parking shop in person, during working hours). RBKC started work on a project to allow on-line permit renewals, and co-located their residents' permits team with other services in a new customer service centre, with an aim to develop multi-skilled residents teams. This has allowed better use of information and increased resolution at the first point of contact.

BORDERS & IMMIGRATION

CASE STUDY

Home Office Border & Immigration Agency

When the Borders & Immigration Agency carried out system mapping to help manage immigration, they worked alongside an Implementation Manager from day one. Together he and the mapping team were thinking about possible actions and implications right from the start.

The implementation manager was kept in the loop at the pre-research stage and was directly involved as soon as findings became available.

The benefits of his involvement became clear when it came to action planning. He helped engage staff, identify competencies needed and develop training programmes, all of which contributed to the successful introduction of new processes and service standards.

GATHERING INFORMATION

Before you start the actual process of mapping, you need to be sure you have the information you need. Follow your own system, talk to colleagues and other departments. Above all, make sure you reflect **the customer**. Ensure you know about all the following:

Activities:
- What are the key tasks and steps?
- What generates them? Why?
- Who's responsible?
- What's the order of events?
- Are there options – different journeys?
- Who performs each step? How?
- Which channels?

Inputs:
- What data inputs are there?
- What step(s) do they link to?
- What forms or reports are used?
- What computer systems are involved?

Outputs:
- What are the outputs from the process?
- How many are there?
- Where do they go?
- How are they used?
- Who reviews them and when?
- What level of detail is needed?

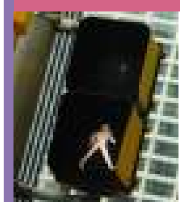
Metrics:
- How long does each step take?
- What are the costs? (to you and to the customer)
- What volumes are dealt with? (how many people, forms, etc.)
- How do time taken and cost incurred vary by journey?

Issues:
- Are there different entry or exit points?
- What problems arise (nature and frequency)?
- What causes them?
- How are problems and errors handled?
- Are short-cuts taken? How?
- Are there peak periods of demand?

TOOLS

SOME TECHNIQUES FOR INFORMATION GATHERING

Walk the walk



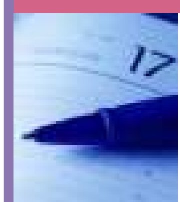
Take time to walk personally through the entire system/customer journey step by step.

Make detailed notes focusing on time taken, duplication, points of high and low efficiency. Compare thoughts with colleagues.

Buddy up

Accompany a customer and front-line staff member going through the same process or system. Experience things exactly as they do. Note down the steps taken and level of satisfaction from both perspectives to compare internal and external experiences.

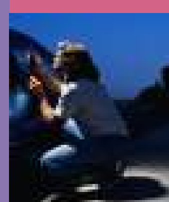
Daily dissection



Get customers and front-line staff to complete detailed diaries as they go through the whole system. Keep close to them and give prompts/reminders to ensure no steps are missed.

Compare the experience from both angles.

Steal with pride



Identify agencies/companies/service providers who have systems similar to yours (both public and private sector).

What do they do differently? Which parts of the system are better/worse? What can you learn and use in your own system?

As you gather your information be sure to record and document what you do, taking care to clearly identify all sources

Mapping the System

SEE ALSO

When you map a system, you don't need the depth of emotional detail used in mapping the customer experience, but you still need to approach this from the viewpoint of the customer. See Section 3, page 27 – "Walking in the Customer's Shoes" for ideas about how to get close to customers.

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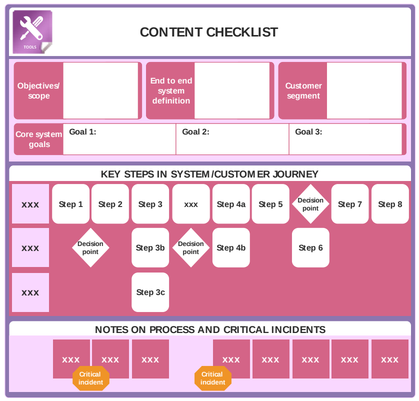
CONSTRUCTING THE MAP: INTRODUCTION

Having set out your maps and gathered information, it's time to fill out the remaining sections of each map and undertaking an initial analysis of it. The following slides describe how to do this. This will usually be done in a mapping workshop, but not always, so we've set out the steps to be taken and then, on pages 71-2, described some workshop approaches

In many cases you'll want to think about both the current experience and the ideal journey. This section explains how to build maps for both

Mapping the System

Completing the map is key, but the map isn't an end in itself. When planning, always allow plenty of time after you've done the mapping, to think about taking action and tracking results.



You should have filled in the top boxes of the map in the set-up stage.
In this stage we'll cover how to fill in all the remainder of the map.

HINTS & TIPS

- Map the process as it actually happens
- Think about it across the whole of government
- Talk to lots of people who are involved - customers, staff, other departments
- In particular, involve frontline people
- Keep probing and asking questions
- Try to map at a fairly high level, at least initially

WATCHOUT

- Don't attempt to start mapping until you've gone through the set-up properly
- Don't map what you think might happen – be honest and objective
- Don't struggle on your own – use a wider team!
- Avoid getting bogged down in detail. If a system is really complex, try breaking it down into manageable chunks

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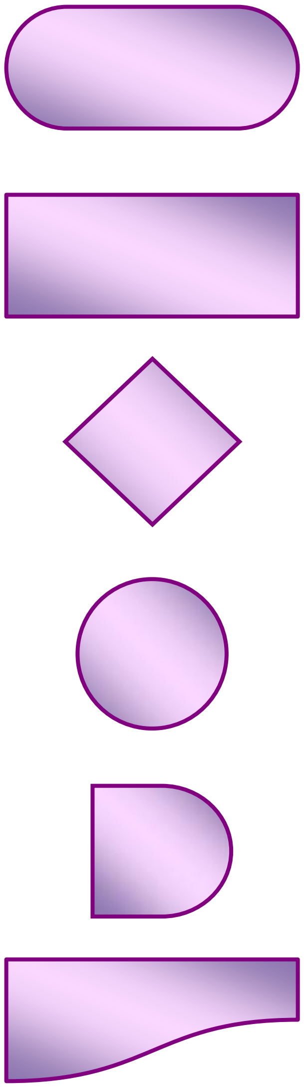
SYMBOLS USED IN MAPPING THE SYSTEM

A large number of symbols can be used to create system or process maps. The key ones that are used fairly universally are shown here:



Terminator
The start/stop point in a process.

Process
Process or action step - the most common symbol.

Decision
Question or decision point, shown with alternative routes coming out of it.

Connector
An inspection point in the process flow.

Delay
Caused by a need for action by a party not doing the process.

Document

HOW THE SYMBOLS ARE USED:
A simple everyday example:
Taking time off school

There's nothing wrong with adding to these basic symbols. However, be sure always to include a key so that anyone reviewing the map knows what it all means.

Mapping the System

ON-LINE CONTENT

More mapping symbols can be found in the online toolbox.

Mapping the System

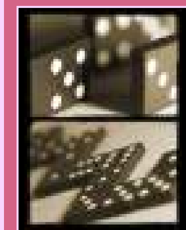
This page shows the steps you need to go through to construct a system map like the example shown opposite.

The following page gives hints to help you in the process.

HOW TO CONSTRUCT A MAP

TOOLS

CONSTRUCTING YOUR MAP: KEY STEPS



Step 1: Identify journey steps

- Choose the level of detail you want to write at; either detail every simple action, or just map enough information to understand the general process
- Identify key steps that occur in the system. Include both what the customer experiences and relevant back office functions. Write them on post-it notes for easier sequencing
- At this stage, focus on events, not decision points
- List steps clearly and succinctly. Use enough words to say what happens, but don't write an essay
- Be very clear on start and end points, and where people enter and leave the system. Distinguish between completed journeys and early 'dropouts'

Step 2: Sequence them and identify decision points

- Put the steps in chronological order – after each one, ask 'What happens next?'. Work on a wall or large roll of paper. If you used Post-it notes, it's easy to move these around until you're sure you've got it right
- Don't draw arrows at this stage – you'll do that later
- When you're happy you have the right order of events, think about the symbols to use for each step (see previous page)
- Specifically, identify and add in decision points
- Include a key for any symbols you use, especially new or unusual ones

Step 3: Identify who's involved and dependencies

- Working downwards on your wall or roll of paper, list out all the parties involved in the process or system, starting with the customer and your own department and moving on to other departments, agencies, NGOs etc.
- Identify which are involved at each step in the process and move your Post-it notes up and down so they appear in line with the appropriate party
- Identify dependencies (see page 66). Once this is done you can add arrows to your map to indicate the flow. Working in pencil to start with helps!

Step 4: Add notes and identify critical incidents

- Final step is to annotate the map with notes – what's going on and why?
- You need to identify where problems and opportunities could arise (see page 67 and the checklists on pages 68 and 69)
- Highlight critical incidents – the points in the process that are real 'make or break' moments
- You may also at this stage want to build the 'ideal' map and carry out a gap analysis – looking at the difference between current experience and the ideal (see page 70)

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THE SYSTEM MAP: FREE SCHOOL MEALS EXAMPLE

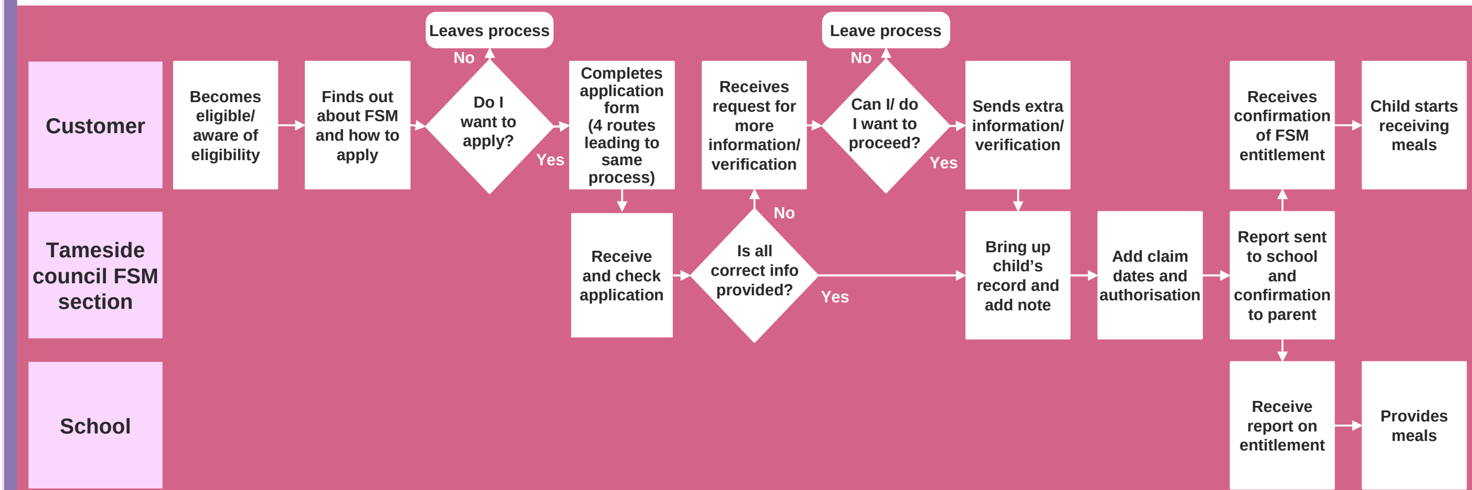
TOOLS

SYSTEM MAP

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	Goal 1: Deliver an important benefit consistently and without delays	Goal 2: Minimise the number of entitled people leaving the process without obtaining the benefit	Goal 3: Contribute towards a required 3% efficiency improvement across the council

KEY STEPS IN SYSTEM/CUSTOMER JOURNEY



NOTES ON PROCESS AND CRITICAL INCIDENTS

- Critical moment
- 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
- Critical moment
- 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

Mapping the System

The worked up example of a system map is based on the work done in Tameside to review the process for applying for free school meals. This map, re-formatted slightly to fit the standard tool used in this guide, reflects the process as it stood when the mapping was first done.

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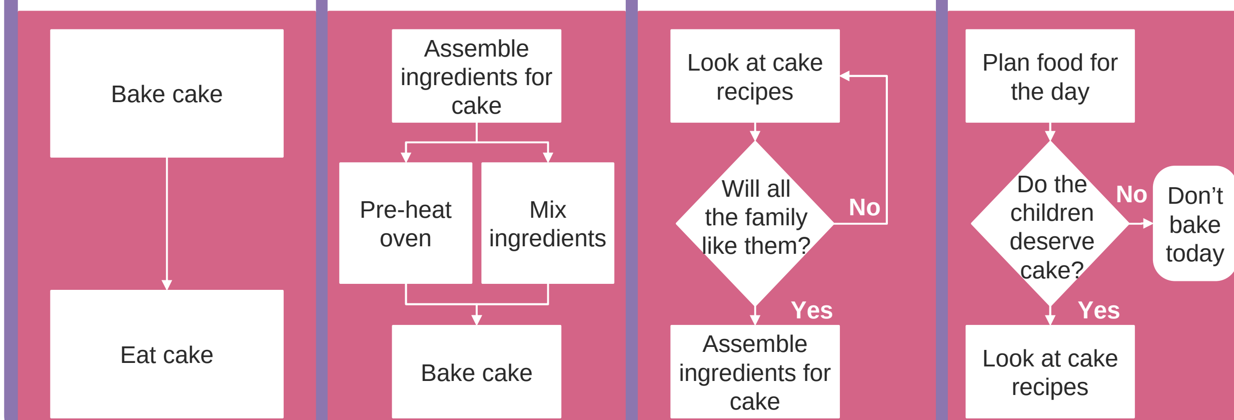
IDENTIFYING AND SEQUENCING STEPS

The tool here shows various types of dependency that are generally used in mapping, and how and when to use them.

MAPPING DEPENDENCIES

TOOLS

Sequential Dependency	Parallel Dependencies	Repetitive Dependency	Optional Dependency
The simplest kind, where one party depends on another completing a task before they can begin their activity.	Where two parties are involved in activities at the same time, and both must finish before the next step can take place.	Where two parties repeat the same handover on a number of occasions.	Where one party can change the process by opting out.



Mapping the System

A 'dependency' refers to the relationship between two actions in a process, where one can't happen until the other is completed.
You'll need to be able to identify and express these on a map, but don't feel too constrained by mapping 'rules'. Express dependencies in any way that suits your process – just make sure you use notes or a key to show what you have done.

HM Government

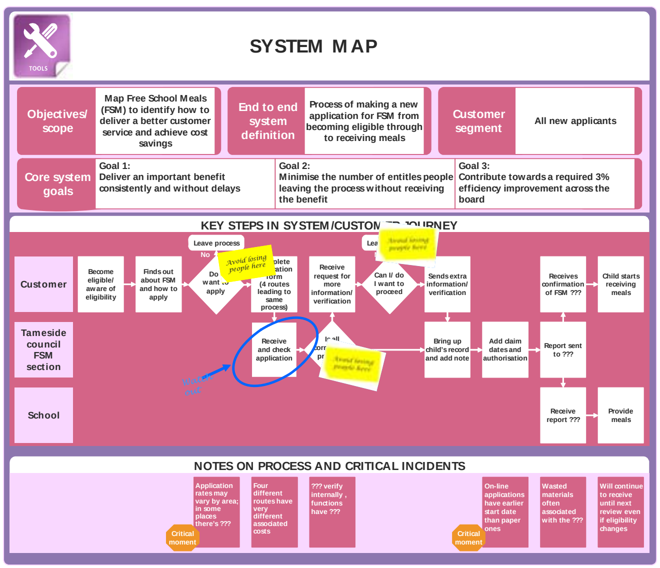
IDENTIFYING PROBLEMS AND OPPORTUNITIES

Once you've produced your map of the current system, it's often useful to think about and identify problems and issues before drawing up the 'ideal' system. Use the checklists on the following pages to help with this.

HINTS & TIPS

WORK WITH YOUR MAP TO IDENTIFY PROBLEM AREAS

- Work with a big copy – it helps to have space to write!
- Using the checklist on the following pages, highlight problem areas using highlighter or marker pens. You can use colour-coding to signify different types of problem, or use Post-its to add notes to your map
- Pay particular attention to what happens at decision points and critical incidents
- Use the notes you've already made, but think beyond these. Look at your process from different perspectives – your department's, other departments' and, vitally, the customer's



Here's the example map from page 65, marked up to identify problem areas. Use whatever method of marking you prefer, but it helps to work on the map itself so you identify exactly where the issue lies.

This is the first stage of problem identification, which you can do after drafting your map of the current process. You'll come back to this again in the 'Taking Action' section of the guide.

Mapping the System

HM Government

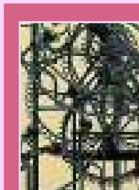
IDENTIFYING PROBLEMS AND OPPORTUNITIES

Mapping the System

*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.*

CHECKLIST 1: THE CUSTOMER EXPERIENCE

TOOLS



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

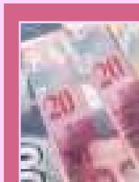
- How long does the whole process take now?
- How long does each step take?
- Are people satisfied with the overall timespan and with time taken for individual steps?
- Where do delays occur and why?

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

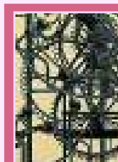
TOOLS

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?

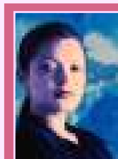


Complexity

- 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

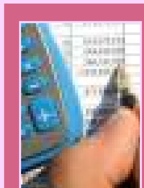
TOOLS

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?



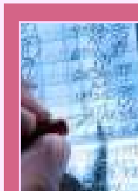
Impact of costs

- 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?

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 4: CHALLENGING THINKING

TOOLS



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

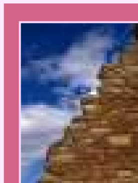
- What parts of the system have been around for a long time without review or overhaul?
- Where have steps proliferated because something's been tacked on to an old system rather than rethinking the whole thing?

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)?

Mapping the System

BUILDING THE 'IDEAL' MAP AND DOING A GAP ANALYSIS

There are two possible approaches to mapping the ideal process. Where you are dealing with relatively small, clearly defined issues in single systems, it's often enough to rework your current map. However, for bigger issues and especially ones that cut across departmental boundaries it is often better to start from scratch.

Mapping the System

After completing your current map and identifying problems with the existing system, it's usually helpful to think about what the 'ideal' process would look like. You can then compare the two maps and identify differences between them – a process know as 'gap analysis.

Use your current map as a starting point and edit it to remove unnecessary steps or make changes to the flow

GREAT FOR

- ✓ Systems or processes that have small, clearly-identified problems
- ✓ Quick fixes when working within a tight deadline

WATCHOUT

- Avoid replicating existing practices simply because they're there; challenge to ensure you're not missing something better
- Ensure you're **preventing** problems not just fixing those that exist

Start from scratch, following the same approach that you used when constructing the current map (page 64)

GREAT FOR

- ✓ Thinking fundamentally about the process with no preconceptions
- ✓ Designing entirely new systems to replace, rather than update, old ones
- ✓ Re-designing systems that cut across more than one department

WATCHOUT

- Allow enough time to do this properly – don't short-change this step just because you've done this once already
- Keep challenging. If you're starting from scratch use the chance to question all assumptions, but…
- …be realistic. You still need to take account of constraints that can't be overcome

When you've completed the 'ideal' map, you can look at how it differs from the current process or system by doing a gap analysis. This can help highlight the benefits of changing the system and can be a valuable input to any business case.

CARRYING OUT A GAP ANALYSIS

HINTS & TIPS

- List out the key differences between the maps, identifying steps that need to be reviewed, processes that need to be changed, and differences in the list of departments/agencies involved
- Identify changes to key metrics (this will help make the case for change). Look at number of steps, number of inputs to the system, time taken to follow it through, number of customer contact points and costs to government and to the customer
- Record any issues arising. You can follow up on these further at the 'Taking Action' stage

THE MAPPING WORKSHOP

PREPARATION

Who?

- Frontline staff
- Experts on the process
- People with detailed, first hand knowledge
- Structured, logical thinkers

How many?

- If you're only mapping one process, about 4-6 people is ideal
- If you are mapping more and need to break into groups 6-10 would be good

Where?

- Logistics are important – lots of wallspace and room to move around
- You could choose an offsite location and/or one relevant to the journey you are mapping, but this isn't essential

ON-LINE CONTENT

See online toolbox for workshop planning checklists

RUNNING

What to bring

- Evidence gathered during set up and planning
- Descriptions of customers
- Any existing measures/metrics (satisfaction, time taken, costs)
- Materials to make mapping visual and clear – different coloured Post-its, coloured pens, rolls of paper

How to run?

- Plan an agenda that's realistic for the time and number of people you have (see following page)
- If you have a lot to cover be realistic. Split into groups or hold a second workshop
- Stress that people need to pay attention to detail and spend time on that

SEE ALSO

See following page for an outline agenda and workshop approaches

CAPTURE AND OUTPUT

What to capture?

- Capture as much as possible – you can always edit down later
- Be sure to photograph maps or number Post-it notes so that sequencing and links are not lost

What output?

- Tidy up and edit after the event. If possible use customers and other people involved in your process to sense-check what you've done
- Make output visual and arresting – use colours and symbols with a clear key

A mapping workshop is a collaborative event, bringing together those who are involved in the system day to day as well as other stakeholders or catalysts for change Plan ahead to get the most from your workshop.

Mapping the System

HM Government

Mapping the System

RUNNING A SYSTEM MAPPING WORKSHOP

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

OUTLINE AGENDA
For a full day workshop

TOOLS

Introduction and ice breaker — **15 mins**

Setting the context — **30 mins**
- Project background and system mapping principles
- Objectives for today

Understanding your system (see approach on right) — **45 mins**
- Share pre-work and inputs from information gathering
- Define system start and end points

Mapping symbols — **15 mins**
- Introduce symbols with examples

Map systems (see approaches on the right) — **60 mins**
- Cover systems for key segments and journeys
- Work in groups as necessary

Share outputs — **30 mins**

LUNCH

Problem analysis — **45 mins**
- Identify where problems most often occur
- Identify duplications, diversions, doglegs

Share outputs — **30 mins**

Map 'ideal' system for key segments — **45 mins**
- Work in groups as necessary

Gap analysis — **30 mins**
- Identify key differences between existing system and the 'ideal'

Share outputs — **30 mins**

Agree next steps and close — **15 mins**

INCIDENT ROOM
Set up a room or large section of wall with lots of stimulus, e.g.
- Photos from different points in the system
- Key documents issued
- Customer communication materials
- Materials from other agencies
- Quotes or insights gathered along the way

See BIA case study, pages 92-3.

WALLPAPER WORKING
Recreate the system on a large sheet of wallpaper. Show all entry and exit points. Identify dependencies and decision points.

POST-IT PARKING
Use Post-it notes to detail each step, arranging them in order to create the sequence of events.
Use different colours to represent different mapping symbols.
Can be used alongside the wallpaper approach.

REVIEWING YOUR OUTPUT

If you follow the agenda shown opposite, by the end of your mapping workshop you should have produced, at least in draft form, a map of the existing system or process, a map of the ideal process and an analysis of the differences between the two. Before moving on to action, it's worth spending some time reviewing your outputs:

1. TIDY UP

Workshop output can be quite messy. Tidy and simplify if it's helpful – you can always add detail back in later.

2. SENSE CHECK

Go through the maps you've produced yourself
Do they feel right?
Is the level of detail appropriate?
Are outputs clearly captured and expressed? Are there any ambiguities or inconsistencies?

3. CONSULT

Before issuing and actioning final maps, get other people's input. Particularly helpful groups are:

Customers
Does your current map mirror the real experience? Is the 'ideal' one really optimal?

Specialist functions
e.g. IT, HR. Can they add detail to the relevant parts of the map? (You could carve it up for this purpose and stitch it back together afterwards).

Other stakeholders
General feedback.
Use them as a 'torture test' to really challenge what you've produced.

4. FINALISE

Collate feedback received and finalise the maps.
Are there knock-on effects from any comments received/charges made? Is anything now redundant?
Is anything still missing?

WATCHOUT

These checklists are different from the ones on pages 68 and 69. The questions here focus not on what's wrong, but on how you might take action to put it right.

Mapping the System

Taking Action is the most crucial part of the mapping process. Producing a beautiful system map isn't an end in itself – it's what you do with it that counts. Think here, too, about whether you know enough about how people really feel about the process– it there value in mapping the customer experience too?

TAKING ACTION

The work you've done to date should have given you current and ideal system maps and some thoughts about differences between them. The next stage is to turn these thoughts into a tangible action plan, and the checklists opposite set out many of the questions you might be addressing

TOOLS **CHECKLIST 1: IMPROVING THE CUSTOMER EXPERIENCE**	TOOLS **CHECKLIST 2: IMPROVING EFFICIENCY**
TOOLS **CHECKLIST 3: REDUCING THE COST TO GOVERNMENT**	TOOLS **CHECKLIST 4: ACHIEVING TRANSFORMATION**

There are four different checklists to encourage you to look at your maps from different angles, but they are NOT mutually exclusive. Achieving cost savings and efficiencies can often go hand in hand with improving the customer experience, as the examples on the back of the foldout sheet will show. Also on the reverse of that sheet are notes and a tool to help you decide which of your possible actions to prioritise.

HINTS & TIPS

WORKING WITH YOUR MAP TO IDENTIFY ACTIONS TO TAKE

- Use as a starting point the work you've already done in creating your maps, specifically the identification of problems with the current system, and the gap analysis (comparing current vs ideal)
- Use the checklists to prompt further thinking and add in any new issues or problem areas
- Using the map on which you've recorded problem areas, use Post-it notes to record your ideas on actions and 'solutions'
- When you identify a potential action, think about any knock-on effects that it may have

TAKING ACTION - CHECKLISTS

CHECKLIST 1: IMPROVING THE CUSTOMER EXPERIENCE

TOOLS

Make it simpler

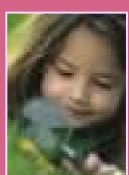
- How can you avoid asking people to do things they've already done (across government as a whole)?
- How can you ensure people are crystal clear who's responsible for each step?
- Can you redesign forms/other materials to make them simpler and avoid errors?
- Should you provide somewhere to go for help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

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 lessened?
- Where slow progress is inevitable, how can you keep customers informed and lessen negative responses?

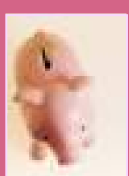
Make it more accessible

- 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?
- Should you be offering new or different channels?



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?)

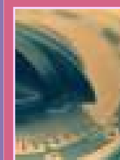


Make it cheaper

- 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?

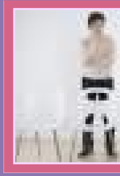
CHECKLIST 2: IMPROVING EFFICIENCY

TOOLS



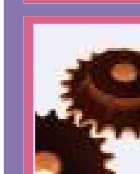
Save time

- 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?



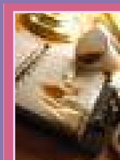
Remove duplication

- 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?
- What would help reduce errors? Better staff training? Simpler forms? More help?
- 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 charges you make to customers reflect the time it takes to serve them? Is it feasible to do this?

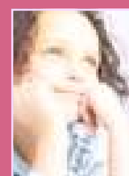
Examine new options

- 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

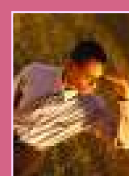
Be challenging

- 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?



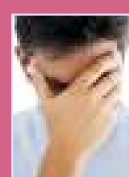
Welcome new thinking

- 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?



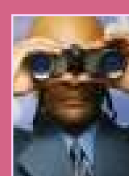
Take a broad view

- 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 remove/reduce 'baton-change' points, so fewer people need to be briefed?



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?

Mapping the System

This page shows the sort of actions that can come out of the system mapping process, identifying where they can bring benefits.
It shows how greater efficiency and cost savings can go hand in hand with a better customer experience.

POSSIBLE ACTIONS AND EXAMPLES

BETTER CUSTOMER EXPERIENCE	IMPROVED EFFICIENCY	LOWER COST TO GOVERNMENT

Cutting unnecessary steps out of a system
e.g. HMRC have streamlined the number of steps in a process as a result of journey mapping, contributing to lower costs and greater customer satisfaction.

Giving more targeted information e.g. HMRC target extra tax advice to those who need it.

Putting in a failsafe to avoid double-checking
e.g. Free school meal application system in Tameside now automatically prompts renewal dates.

Switching appropriate customers to cheaper channels
e.g. Dudley Council's channel strategy is currently being validated by considering the customer experience, segmenting the customer base, addressing life events and avoiding departmental silos.

Improving skills and training
e.g. As a result of journey mapping, BIA have specified staff competencies and brought in new training to deliver these.

Reducing staff numbers
e.g. Putting services online means lower headcount.

Reducing the number of decision-makers involved at key points
e.g. Having reviewed processes, Southwark Council have introduced new front office systems for call centre agents to deliver work orders to field operatives without back office intermediaries.

More support when needed
e.g. The prison service's use of buddies to sit with new inmates.

Removing the need for paper records
e.g. When Tameside overhauled the system for free school meal applications, electronic records replaced many paper ones.

Moving from multiple branding to a single brand
e.g. DWP, DH, BERR and DEFRA linked their winter-warmth campaigns, aimed at older people, under one brand. This resulted in fewer help-lines, focused comms and a much simpler customer offering.

Complete System redesign
e.g. The 'Tell us Once' campaign, led by DWP, will result in a linked system that will be much simpler for customers, reduces errors and inefficiencies and will ultimately be much more cost-effective.

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:

	Possible Criteria
Cost	■ Financial cost (one-off and ongoing) ■ Time cost ■ People cost ■ Other resource ■ Level of risk
Benefit	■ Better customer experience ■ Improved outcomes ■ Reduced waste ■ Enhanced staff morale ■ Reduction in avoidable contact

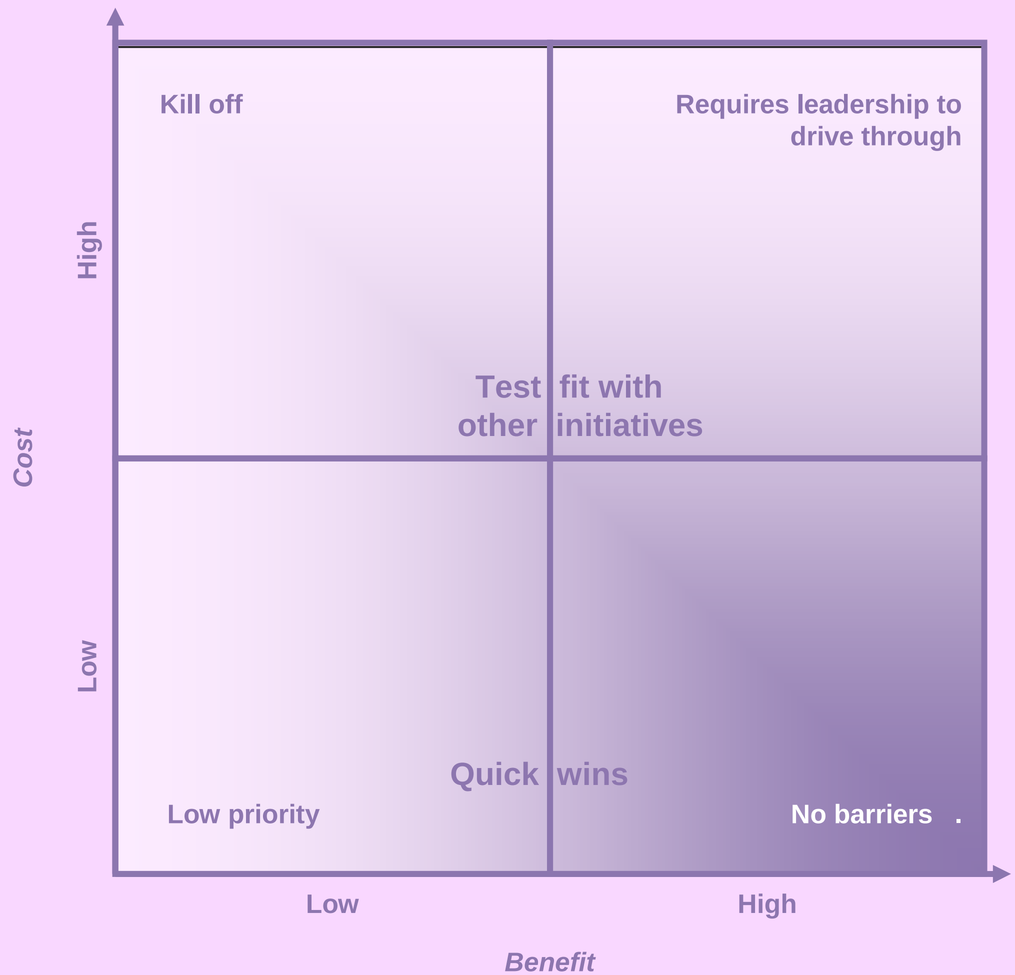
Once you have undertaken the analysis, you can plot the results using the 'Prioritising Actions' tool on the right. This is a relatively simple tool but can really help guide your thinking. A quantified tool for prioritisation in included in the online toolbox.

WATCHOUT

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

TOOLS

PRIORITISING ACTIONS



EVALUATING RESULTS

At the start of the journey mapping process, in the set up phase, one of the actions was to ensure that you set clear, measurable objectives. This is the point at which you need to go back to these and test how well you are performing against them.

Make a judgment about the best time to carry out an evaluation of the actions you have taken. You need to allow enough time for actions to take effect before doing this.

Your ability to carry out a quantified evaluation will depend on the information you collected at the mapping stage. The more metrics you used, the more effectively you will be able to analyse progress made.

However, if you mapped without using metrics, you can still go through an evaluation process by using benchmarking – see page 53 in Section 3 for details.

SEE ALSO

Section 5 of this guide gives more practical and detailed information about how to go about measuring the customer experience.

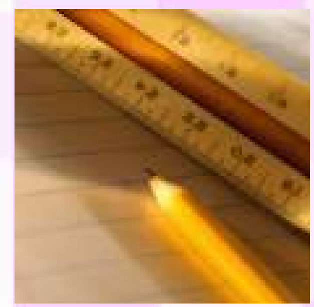
THINGS YOU CAN MEASURE INCLUDE:

Inside out measures:

- Total time taken to complete the journey
- Time taken to complete each step
- Volumes; e.g. number of customers dealt with per hour, number of transactions per day
- Costs of completing each step
- Amount of rework required
- Customer satisfaction
- Number of complaints received
- Cost of handing complaints

Inside out measures:

- Number of steps
- Time taken for whole journey and for each step
- Time/effort/cost required to complete each step



CASE STUDY: HMRC COST TO SERVE

HMRC have used mapping the system to look at the cost to serve. Their objective was to redesign complex processes to provide a better experience to the customer at a lower cost to both customer and HMRC. Customer focus and user engagement were key parts of the project right from the start.

" By showing that better customer experiences can go hand in hand with reduced costs we're hoping to shift people from a 'win-lose' attitude to a 'win-win' one."

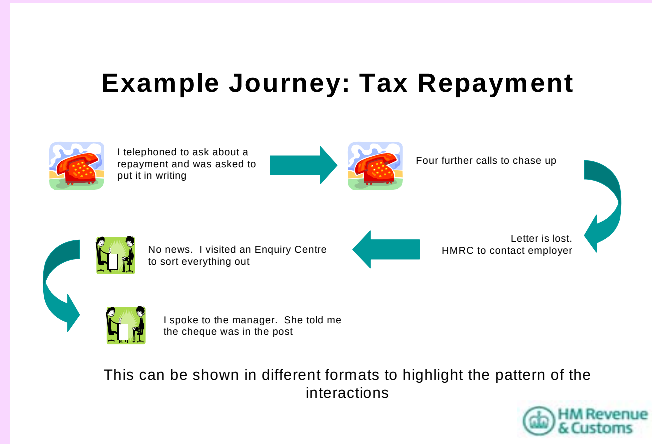
Mapping the System

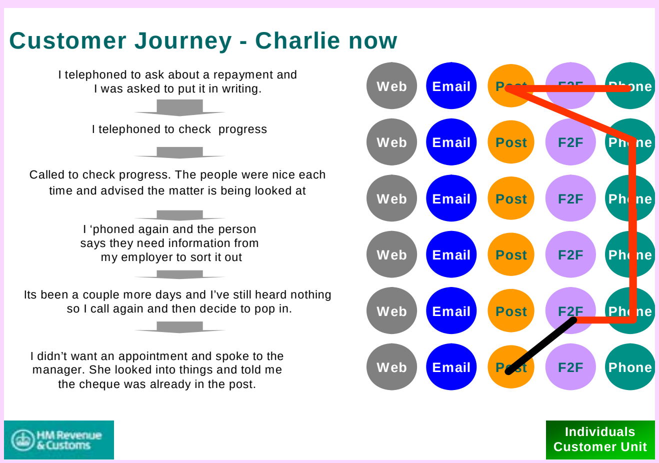
HMRC started the mapping process by identifying the journey to be mapped. They looked at the current and the 'ideal' experience and put in place metrics that would allow them to measure and evaluate results.

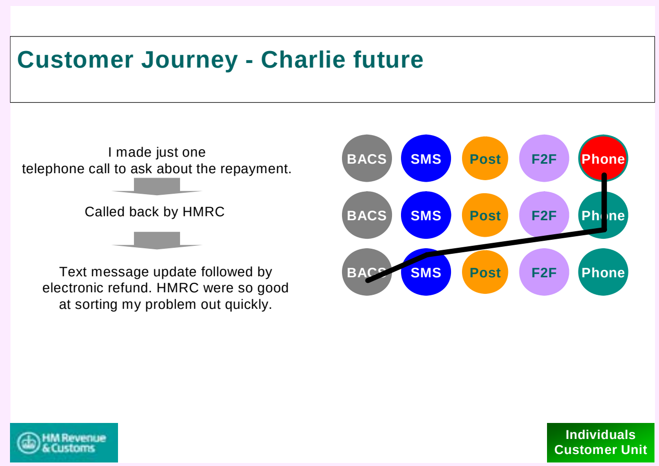
This included calculations of the cost, to the customer and to HMRC, of using different channels.

The journeys were then mapped and costed, and comparisons made to look at current versus the future desired experience.

Outputs were clearly laid out using a very visual format.







Section 5

Measuring the Experience

HM Government

INTRODUCTION

Measuring the Experience is about getting a quantitative measurement of the customer experience. It will often follow customer experience mapping and/or mapping the system, and allows you to measure customer satisfaction and understand numbers and costs associated with a process, system or experience.

In this section we describe how to apply measurement to a customer experience using deep customer understanding, moving through to taking action and evaluating results. In doing this we've assumed you have already mapped either the experience or the system, and so have not repeated here all the tools in those earlier sections of the guide. If you haven't carried out this earlier mapping, refer back to the earlier sections as referenced in the text.

Five steps are covered in the pages that follow:

Measuring the experience is important because it:

GREAT FOR

- Enables you to understand the key things that are most important in shaping the customer experience and driving customer satisfaction. This means you can focus time and resource on the things that matter most to your customers
- Helps you understand the role that external factors play in influencing the customer experience so you know what you can and can't control
- Gets everyone involved in the customer experience aligned, focused and motivated to deliver the service that will truly satisfy the customer.

This section describes the third mapping approach and sets out steps and tools to help.

ON-LINE CONTENT

Core tools are included in this guide but there are more in the online toolbox.

Measuring the Experience

SEE ALSO

See also CIF's guidance – "Promoting Customer Satisfaction", which has been used in producing this section.

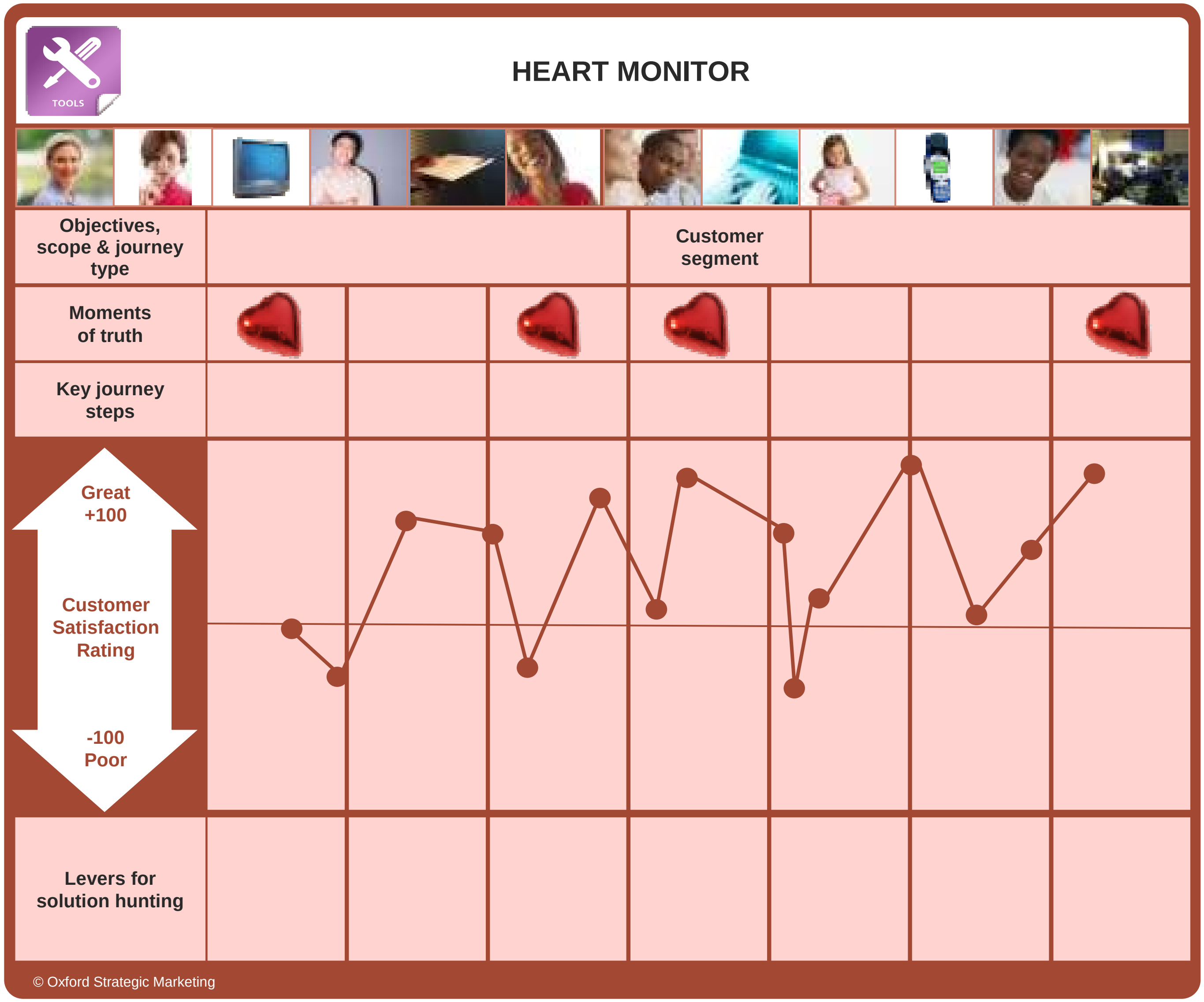
HM Government

This is the key tool we'll be using in this section. You may have already used a Heart Monitor to map an experience qualitatively, but here we are using it to map output from quantified customer research.

When you are using the heart monitor with quantified data, the ratings here will correspond to those used in the customer research that you carry out.

KEY OUTPUT

The Heart Monitor tool graphically illustrates the highs and lows of your customer journey, mapping the output of quantified customer research. It can correspond to steps on either a customer experience map or a system map.



SET UP – CHECK THE CONTEXT

Assuming that you have already mapped the experience or system qualitatively, you should have already defined objectives, scope and target customer segments. If so, you need here simply to confirm that they still hold true for the quantitative research you are going to carry out.

Checking the context:

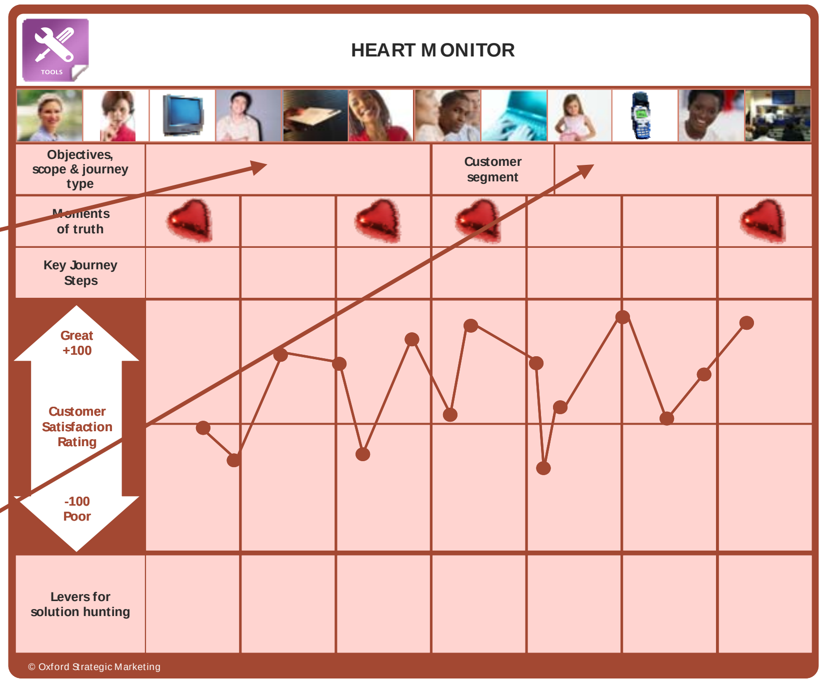
- Are the objectives and scope of your project the same as before, or have there been changes?
- Is the journey the same one that you defined earlier? Did any changes come out of earlier mapping exercises that you need to reflect here?
- Are you still considering the same customer groups? Do you need to split any out or merge any groups together?

If there have been changes to objectives, scope, journey type or customer segment, you need to carefully rethink the implications of these. If necessary, go back to the earlier set-up sections (page 23 for experience mapping and page 57 for mapping the system) and work through these again.

Once you've confirmed the context, you can go on to set up your map or maps as before:

Objectives, scope and journey type
What this mapping needs to do.
Single, well-defined journey with clear start and end points.

Customer segment
The specific group you're mapping here, with key defining characteristics to distinguish them from other groups.



If you haven't carried out a qualitative mapping exercise, you need to establish the context for you mapping.
Go back to pages 23-25 in Section 3 for guidance on set up and the mapping context.

Measuring the Experience

HM Government

If you have already carried out qualitative customer mapping, this should help to guide the planning and execution of your quantitative research. It will help define the exact journey you map and ensure you are asking the right questions of the right people.

Make sure that any agency is absolutely familiar with the work done already, and keep stakeholders and customer-facing staff involved so that they can input to the new research.

Measuring the Experience

ON-LINE CONTENT

The online toolbox contains more tools about gathering information

For local government there is also useful advice in the Customer Insight Protocol – see page 9 for details.

GATHERING INFORMATION

Gathering quantified information for customer mapping will usually be done with the help of an agency, who can handle large numbers of people and carry out statistical analysis.

The best starting point is your Insight team if you have one. If not, talk to a member of the Customer Insight Forum, who will be able to advise on this (see page 9).

It's also worth using the CIF publication – 'Promoting Customer Satisfaction', which gives lots of general information about who to talk to and what to ask when conducting customer research. See page 9 for details.

Remember to look also at what you already know about your customers, to avoid duplicating existing work, wasting time and resource. Are you starting from scratch, or are you well on the way with an existing study that can provide you with some of the information required?

Sources of Existing Information:

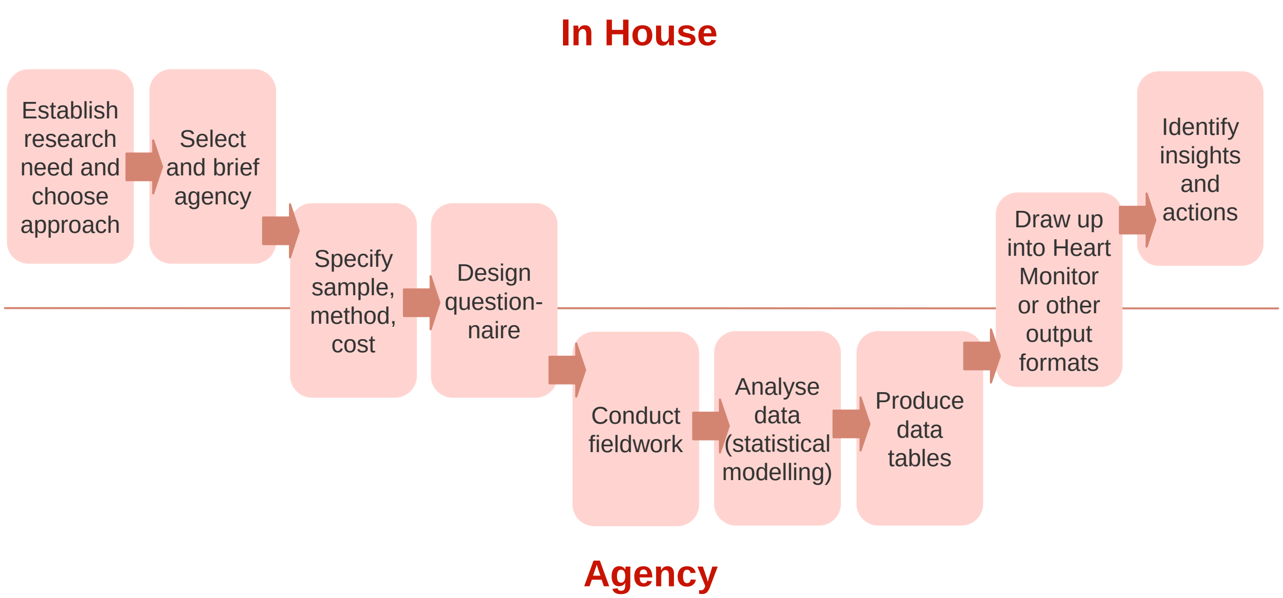
- Administrative Data : can be a rich source of information for organisations. This can include call volumes data e.g. waiting times, 'hang-ups' and answered calls, website statistics e.g. number of people visiting website, pages viewed and return visits, applications data e.g. benefit claims over a period of time
- Complaints Data : can be used to identify current areas for improvement as well as to inform areas to be included in research to measure the experience
- Mystery shopping data : many organisations conduct mystery shopping in order to monitor the services being provided to its customers. This can be a valuable source of information and can inform areas to be covered in research to measure the experience
- Existing survey data : taking time to find out what survey data already exists is a valuable process that often gets overlooked. Different research may be carried out by different teams, so look widely

BRIEFING AN AGENCY

You need to ensure that any external agency used for quantitative fieldwork is absolutely clear about what information you need, why you need it, and how it will be used.

Talk to your insight and research professionals about agencies you might use (not all agencies will do this kind of work) and how best to use them. You could use them just for the fieldwork, or could get them to deliver a completed heart monitor. The tool here sets out key steps in the process of carrying out journey mapping research and indicates which jobs are usually done in-house, which are generally done by an agency and which can be done by either, depending on resource, budget etc.

RESEARCH PROCESS AND RESPONSIBILITIES



Overleaf there's a further tool you can use - a template, with headings and prompt questions, to help you to brief an agency or internal research function.

If you have an insight or research function, use it as a first point of contact.
Your brief can go to the people in that function and they will then select and brief an agency.
COI have experience in this area and might also be able to help, and CIF can advise and support you.

Measuring the Experience

Research fieldwork (the actual data-collection part) can be done using all the customer closeness techniques described in Section 3. When briefing agencies, encourage agencies to be creative in the approaches they use to collect and feed back information.

Measuring the Experience

BRIEFING TEMPLATE

Gathering quantified information for customer mapping will usually be done with the help of an agency, who can handle large numbers of people and carry out statistical analysis.

<table>
<tr><th colspan="4">TOOLS
RESEARCH BRIEFING TEMPLATE</th></tr>
<tr><td>Subject</td><td colspan="3">• What you would need to tell someone who knew nothing about this in order for them to understand what you're talking about?</td></tr>
<tr><td>Objectives, scope and journey type</td><td>• As laid down when you set out your maps</td><td>Customer segment</td><td>• As laid down when you set out your maps</td></tr>
<tr><td>What issues are you looking to resolve?</td><td colspan="3">• What's the overall challenge (as defined at the start of the project)?
• Where do you believe the problems lie (based on your initial qualitative mapping)?
• Why are you doing this research – what are the key triggers (policy change, customer dissatisfaction, operational issues, cost issues etc)?
• What are the specific issues you need to address?</td></tr>
<tr><td>Why is this important?</td><td colspan="3">• What critical questions do you need the research to answer?
• What exactly will you do with the results?
• What benefits will result, to you and to the customer, if your project is successful?
• How might the customer experience be improved?
• Are there any mandatory requirements that you have to deliver on?</td></tr>
<tr><td>Practicalities</td><td colspan="3">• Identify the journey steps and moments of truth as you currently understand them
• What budget is available for this work?
• When do you need the results?
• Are there any immovable deadlines?
• Are there any issues that might cause problems or delays?
• In what format would you like the results to be delivered?</td></tr>
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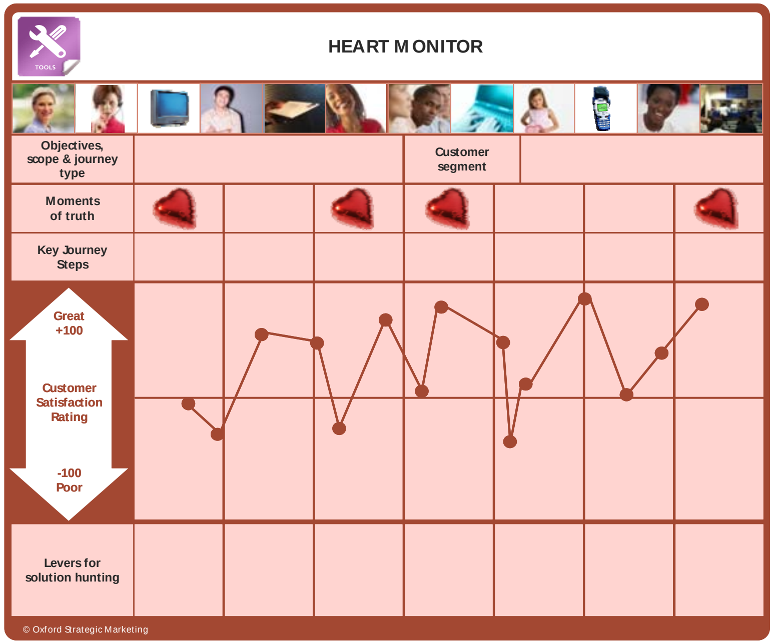
CONSTRUCTING THE MAP: INTRODUCTION

When the research has been done and data is available, you can begin to complete the heart monitor format. The core section is the middle part, where you need to plot the scores recorded during the research.



You should have filled in the top boxes of the map in the set-up stage.
In this stage we'll cover how to fill in all the remaining parts of the map

Make the map as visual as possible. It's a fantastic tool for engaging people so use outsize paper, colour, quotes & photographs to bring it all to life.

A few simple principles for filling in the map:

- As with all journey mapping, remember that the starting point is the customer – it's the customer's heart you're monitoring. Forget the internal perspective – stand in the customer's shoes
- The tool is at its best when you have quantified data for the journey steps, but where this isn't possible the heart monitor can be completed using qualitative information
- Write in everyday customer language and avoid internal terms or jargon. This approach may be quantified but it can still be emotive.
- Be realistic in the steps you choose to map. In a detailed process with many steps, try to focus on the important areas rather than getting lost in unnecessary detail

This page shows the steps you need to go through to complete a heart monitor like the example opposite.

The following page gives hints to help you in this process.

Measuring the Experience

HOW TO CONSTRUCT A HEART MONITOR

TOOLS

CONSTRUCTING YOUR HEART MONITOR: KEY STEPS

Step 1:
Confirm the key journey steps

- Review the research you have done to ensure that the journey steps that you set out to investigate still hold true. Do customers agree with the start and end points you identified?
- Look at the chronological order - challenge to make sure you've got the sequence right
- Ideally you want to map around 6-10 key journey steps. If you have more than that choose the ones that are most important

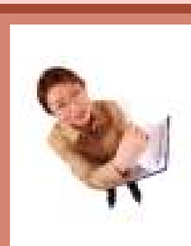
Step 2:
Plot the highs and lows of the experience

Use the research results to plot the following information:

- For each key step, identify the priority service elements from a customer perspective
- Record each element, using customer language
- From your research, plot the satisfaction level for each element
- Are there still gaps in your understanding? Consider further research or analysis if so

Step 3:
Identify moments of truth

- Identify the pivotal points where customers are highly emotionally engaged or challenged (see tool for helping do this on page 88)
- You're looking for 3 or 4 occasions where customers may consider quitting, coming back later or not at all
- Do you understand what's happening at moments of truth? Customer satisfaction scores at these points are crucial to understanding how to transform your offer



Step 4:
Identify levers for solution hunting

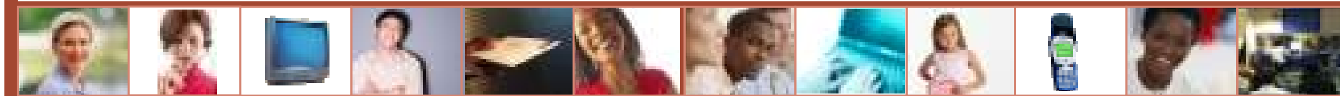
- For each step, identify the things that are driving satisfaction levels
- Confirm which of these are things that you can control, and assess which offer opportunities to optimise the customer experience
- Consult the list of levers on page 49 to decide which you can use in this process

EXAMPLE: MINISTRY OF JUSTICE

CASE STUDY

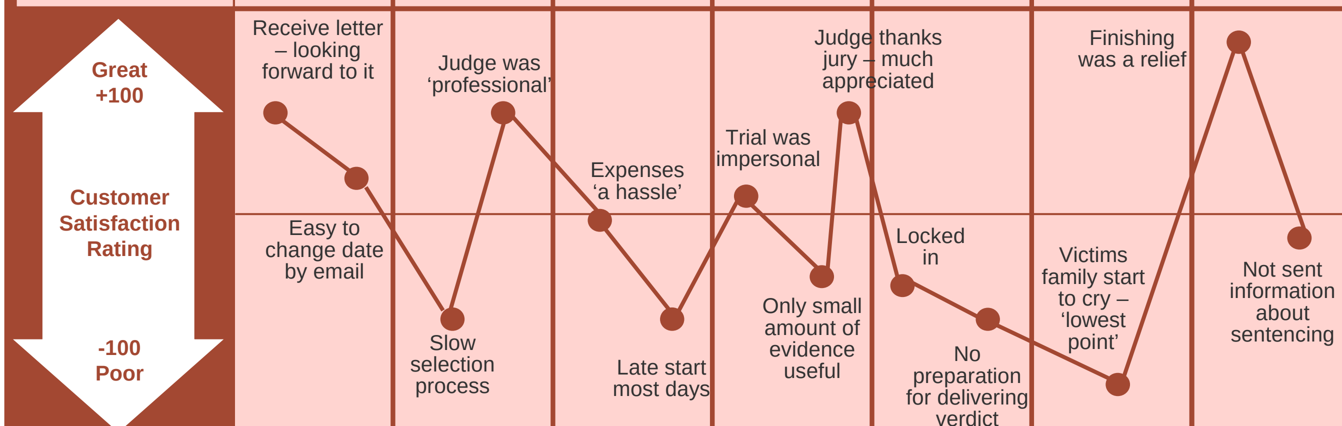
HEART MONITOR

TOOLS



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

Moments of truth							
Key journey steps	Receive summons	Jury selection	In court pre-trial	In court – during trial	Deliber-ation	Delivery of verdict	Post trial



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

This is based on an actual example of a heart monitor created by the MoJ and HMCS. It's been shortened for simplicity and reworked slightly into the formats used in this guide

Measuring the Experience

HM Government

TOOL: FURTHER ANALYSIS

KEY DRIVER ANALYSIS: IDENTIFYING MOMENTS OF TRUTH TOOL

Your research study should provide you with a list of the factors that will result in an improved customer experience, but it may be quite long. You need to uncover the key drivers, those we call the moments of truth.

Key Driver Analysis uses statistical modeling to isolate these important factors. You'll need to get experts involved in this bit. The output can be presented in a user-friendly format that can communicate the findings and the necessary actions to all staff, whatever their prior knowledge or experience.

You can bring the moments of truth to life by exploring them further through qualitative research. This can also examine the issues in more detail to get to the route cause of the dissatisfaction. For example, customers may be unhappy with the Call Centre response, but it may be the connection process rather than the staff dialogue that is driving concern.

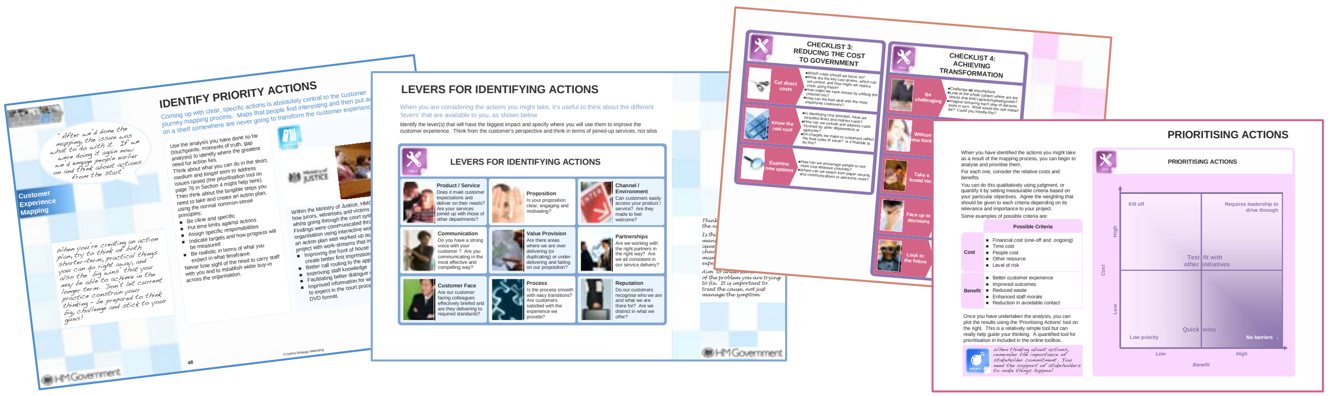
Verbatim comments from customers can also illustrate the findings in a more powerful way than charts or numbers. They can get to the 'heart of the matter', key for this kind of measurement.

DEFRA used a review of existing research to identify moments of truth or 'pain points' for farmers.
The exercise provided a valuable gap analysis for customer needs, which informed decisions on policy and service delivery.

TAKING ACTION

You now need to use the all of the information you have pulled together.

To do this, you can use all the ‘Taking Action’ guidance in sections 3 and 4 of this guide – see pages 45 to 52 for customer experience mapping and pages 74 to 76 for mapping the system.



In particular, focus on the actions that you can take with confidence now that you have quantified information, for example:

- Making a business case and selling an initiative to stakeholders
- Identifying the points in a system where you should focus effort and resource
- Making decisions about priority groups
- Deciding where and how to develop new channels.

The prioritisation grid (page 76) can help at this point.

The Heart Monitor tool is a fantastic visual displays of where you need to focus attention.

Use it in presentations, but also consider making a large version available, putting it in a visible location, e.g. by the photocopier so that it acts as a reminder for staff.

Keep it updated when new results are available. Detail actions in progress and areas where improvements have been seen.

Measuring the Experience

“The power is in the story telling. We’re bringing in comms people to tell the story – we’re working as a team”

Measuring the Experience

EVALUATING RESULTS

When planning your actions you should have included how you will measure success.

As before, you can refer back to the earlier sections of this guide for ideas on evaluating results, such as benchmarking (page 74) and using metrics (page 77).

Having this quantified study gives you a perfect benchmark. By repeating it again at some point in the future, you can re-plot the experience and look at how people's thoughts, feelings and levels of satisfaction have changed over time.

Section 6

Case studies

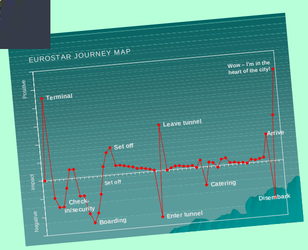
HM Government

CASE STUDIES - INTRODUCTION

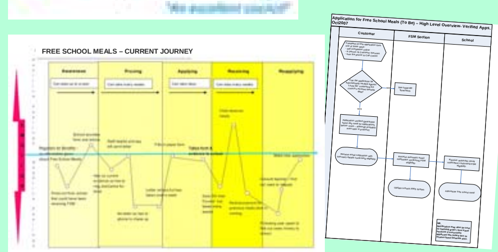
In producing this guidance, we have come across a number of great examples of customer journey mapping. We've reproduced four of the best ones in the pages that follow.

Page 92-3

Page 94-5



Page 96-7



Page 98-9

For more information about these case studies, or other examples given in this book, please contact the CIF (contact details on page 9).

CASE STUDY: BORDERS AND IMMIGRATION AGENCY

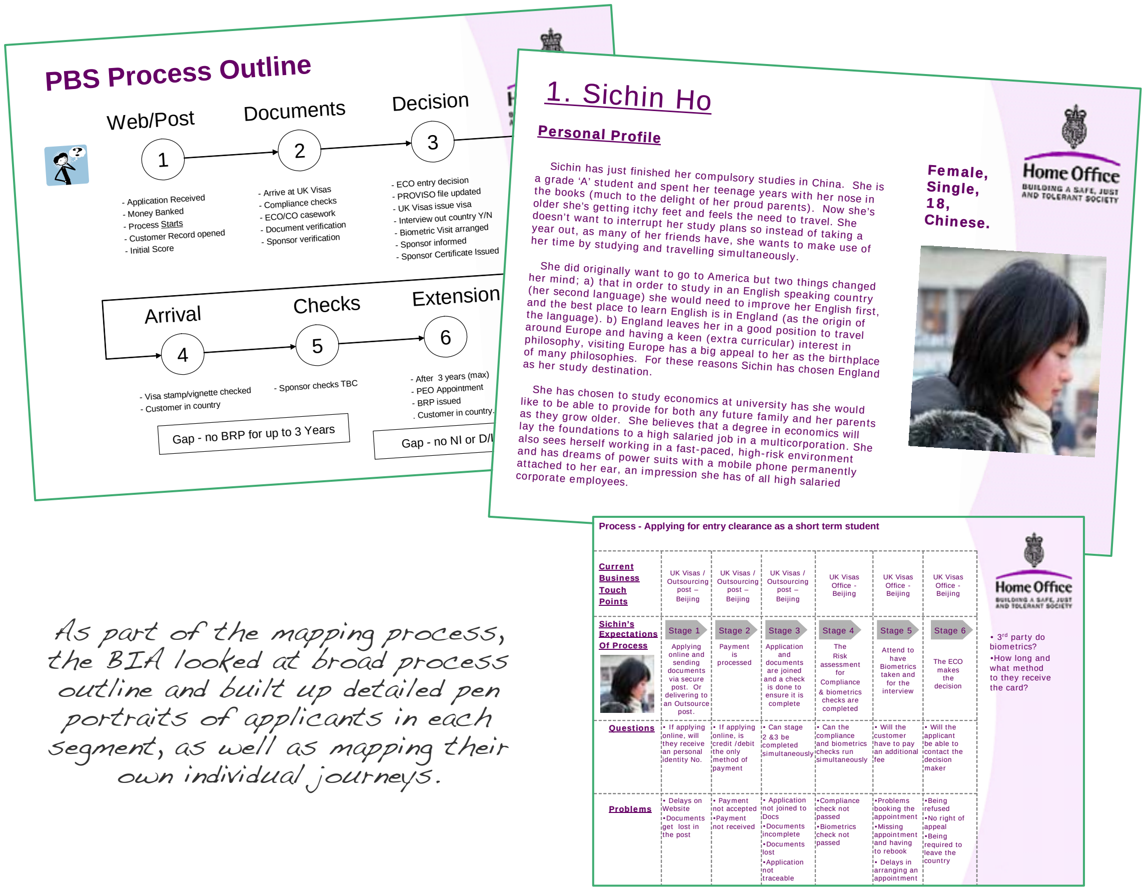
BACKGROUND AND OBJECTIVES

Two years ago, the Borders and Immigration Agency set up a new Customer Service function, aiming to increase the quality and timeliness of service provided to those wanting to visit the UK, and to achieve cost efficiencies in doing so. The new function started by looking at how people felt about migration and how they went about making applications, with a view to setting up a satisfaction programme to ensure applicants were able more easily to access clear and consistent information. Journey mapping was identified as a powerful way of understanding customer expectations, and identifying where and how the current system failed to meet these, in order to find ways of improving the system.

APPROACH

The process started with internal evidence-gathering and segmentation work. The Customer Service team talked to customer-facing people on the ground, plus their managers, and also to related functions such as the FCO and the British Council.
This was followed by a basic customer segmentation and initial journey mapping, done in-house using internal consultants to identify customer preferences, process blockages, service touchpoints and moments of truth, where service directly impacted on customer perceptions.
A postal survey of over a thousand customers followed, focusing on service standards. The initial journeys were re-worked to add depth and bring the different customer types to life. A “working wall” was established, where the maps were portrayed visually - acting not only as a tool for those doing the mapping, but also as a powerful way of capturing the attention and imagination of stakeholders.
Throughout the process, the team worked alongside an implementation manager who was thinking from the start about action planning
Currently, BIA are continuing to develop their maps further, to focus more on efficiency and cost to serve.

The BIA ‘working wall’ captured both current and ideal experiences, for applicants and sponsors. The original version, at the BIA’s Croydon head office has been replicated in various hubs.



As part of the mapping process, the BIA looked at broad process outline and built up detailed pen portraits of applicants in each segment, as well as mapping their own individual journeys.

KEY LEARNINGS

- Early involvement of an Implementation Manager meant that action planning was part of the process from the start
- It's important to talk to both managers and people on the ground – the greatest value comes from contrasting their views
- The working wall was a hugely effective tool, both for working out journeys and selling the outputs of the exercise
- The sell-in needs to be extended and persistent – BIA had to earn their resource and budget by proving the value of the work

We did a lot of marketing by stealth, with persistent meetings to get the buy-in we needed

Case Studies

ACTIONS AND OUTCOMES

The mapping work has resulted in a greater customer focus, delivered with improved efficiency.
Journey mapping has been used to re-design application forms and to design a new on-line points-based system for applicants. Service and strategy standards have been defined, and service level agreements have been established with different parts of the operation. Implementation plans have included the identification of staff competencies and new training programmes to ensure people have the skills they need.
Most recently, a focus on metrics has allowed BIA to calculate costs and volumes, which they are applying to all priority segments.

CASE STUDY:HMRC

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.

Case Studies

HM Government

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: EUROSTAR

BACKGROUND AND OBJECTIVES

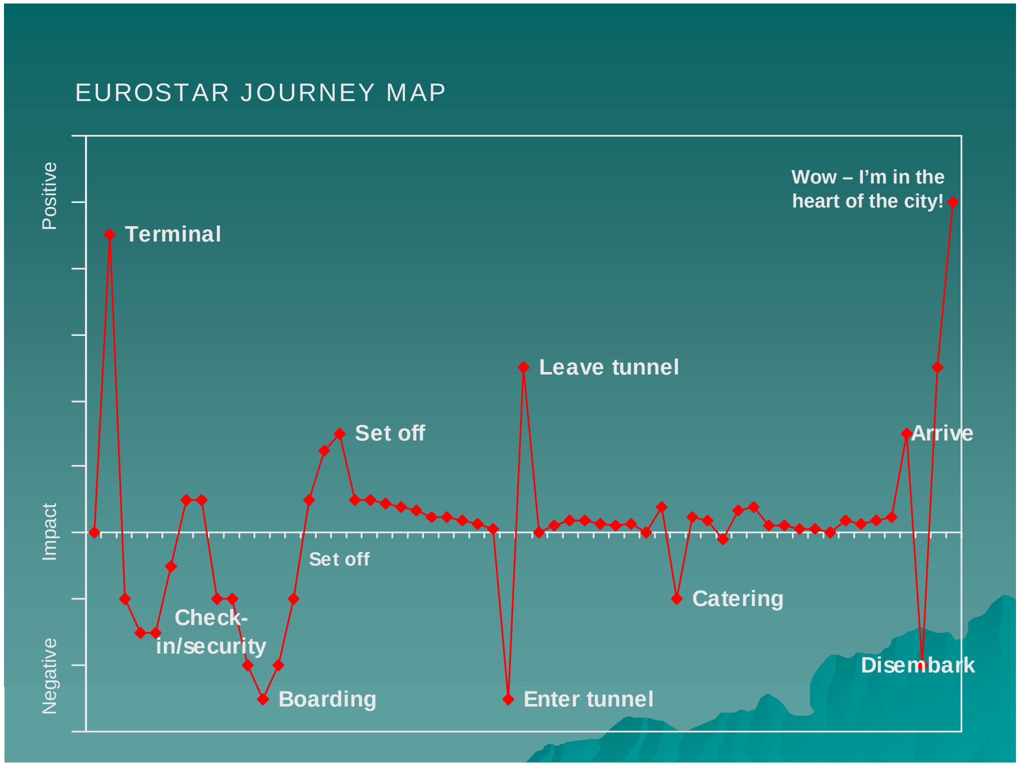
Eurostar was launched in the UK in 1994 giving people, for the first time, the chance to take a non-stop train to the continent. It had a potentially dramatic impact on travel habits and attitudes – Britain's status as an 'island nation' was changed, and people were impressed by the futuristic design of the trains and the incredible engineering feat of tunnelling under the English Channel.

However, within Eurostar the magnitude of this impact on people was not fully appreciated. 'Old school' British Rail veterans had great technical and operational expertise but did not traditionally have a customer orientation. There was no recognition of the importance of consistent experience delivery, and Eurostar was under-performing against forecasts. This meant that management time was being spent thinking about the City rather than thinking about passengers, and prices were being cut – exacerbating the ability to address under-performance issues.

The appointment of a new Chief Executive with a marketing background acted as an important catalyst in bringing about change. He recognised that the whole culture of the organisation had to change to become more customer-focused, which involved rekindling the pride and enthusiasm of staff.

APPROACH

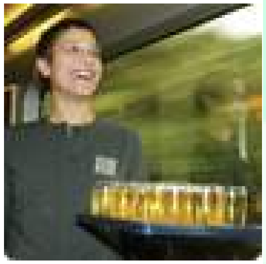
Workshops were held with senior board members who did not have a particular customer orientation. During the workshops they were asked to "walk in the customer's shoes", which included dressing as the customers and thinking through every step of their experience.
After the workshops, the same board members were encouraged to make the journey for real, shadowing customers who looked like the ones they had role-played, to verify that the journey that had been described was true to life.
Results were plotted using a heart monitor to track the highs and lows of the experience for different customer groups. The outcomes were confirmed by a separate and independent piece of research carried out by the French Eurostar organisation.



KEY LEARNINGS

- The over-arching theme of the work that was done was 'ownership'. Without this there could be no passion for delivery. All solutions and outcomes were defined by employees themselves
- Cross-functional working was essential. Departmental champions were appointed across the company, ensuring that no one part of the organisation had responsibility for the programme
- Manager participation and engagement was vital in enabling fast action by having great ideas championed from the top

Journey mapping was instrumental in moving Eurostar from being a 'train operator' to being a 'customer service provider'.



ACTIONS AND OUTCOMES

Mapping identified the highs and lows of the journey – the points where people became bored, and the real fear many experienced when entering the tunnel. Above all, the real benefit of Eurostar was clear – the 'WOW!' factor of arrival. This led to a proposition of 'Inspiring travel', which was subsequently (and very successfully) executed as 'Arrive right in the heart of the city'.

By making the journey themselves, staff realised the critical part that they played in determining whether the journey was enjoyable or not. They appreciated the different needs of different customer groups, and that they couldn't all be treated in the same way.

Staff were also able to suggest really practical and workable solutions to problems, which not only improved the experience but, in many cases, reduced costs too. Mapping helped give a basis for prioritisation, allowing managers to decide which parts of the journey to invest in.

The exercise formed a basis for ongoing customer satisfaction tracking.

CASE STUDY: TAMESIDE FREE SCHOOL MEALS

Case Studies

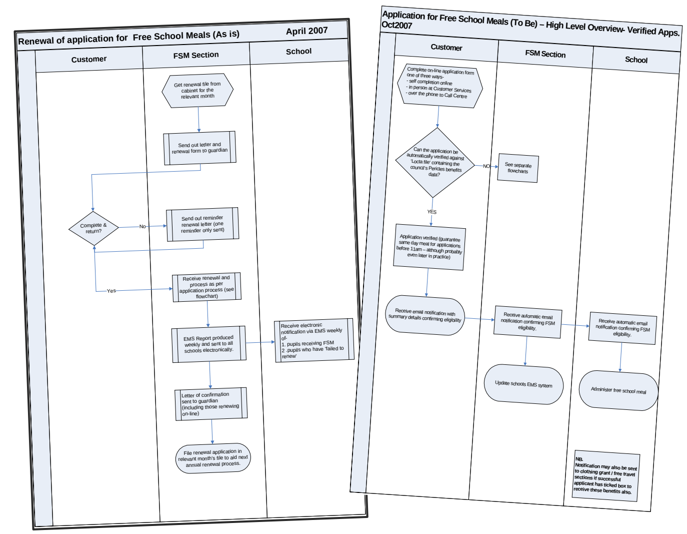
BACKGROUND AND OBJECTIVES

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.

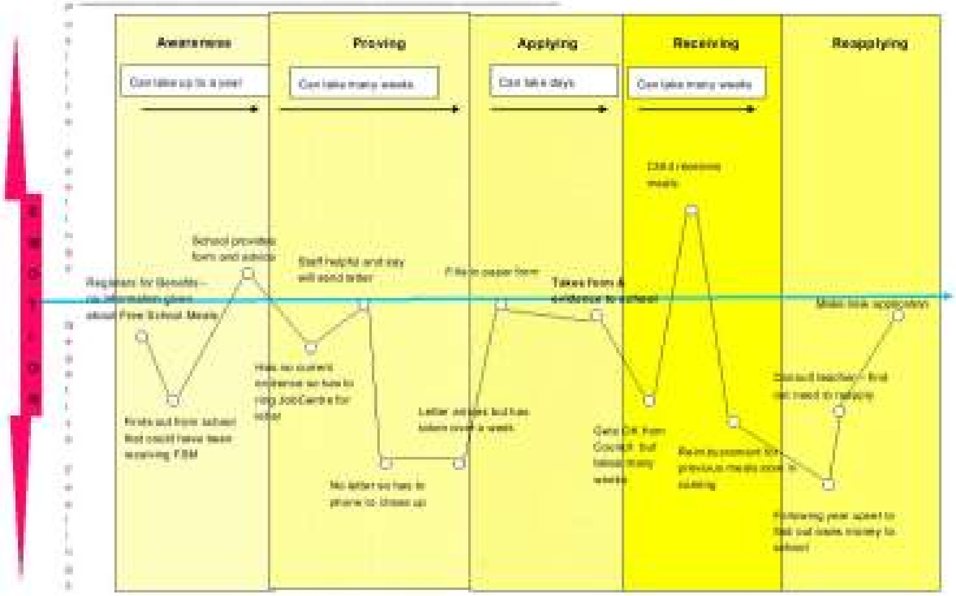


System maps were produced for current and 'ideal' experience

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 re-design the way applications were made and handled. This was followed up by a customer survey to validate what had been done and monitor levels of satisfaction.

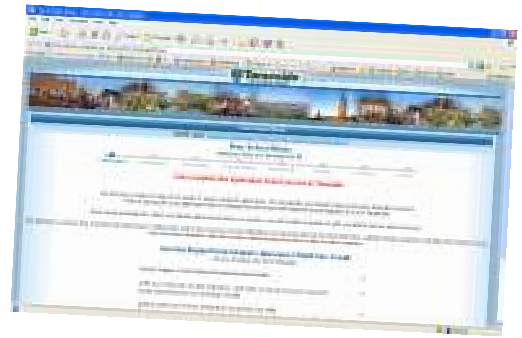
FREE SCHOOL MEALS – CURRENT JOURNEY



Journeys could also be plotted using customer experience maps

KEY LEARNINGS

- Greater efficiency and a better customer experience aren't at odds with one another – often they go hand in hand.
- Following a process right through allowed the team to understand all implications. In this case, the potential savings of migrating people to the cheaper online channel was realised only when they were able to stick with that channel from start to finish



" ..(an)application for Free Schools Meals benefits and the associated clothing grant that often required 10 or more contacts to successfully complete can now be done in a single visit"

ACTIONS AND OUTCOMES

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, whilst an e-transaction, completed online from start to finish, costs only 7p.