

Customer Journey Mapping

Guide for Practitioners



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CASE STUDY



TOOLS



HINTS & TIPS



GREAT FOR



WATCHOUT



SEE ALSO



ON-LINE CONTENT



HELP

Section 1

Introduction



INTRODUCTION

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.

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.

Introduction

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



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

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



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 scalable - 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.

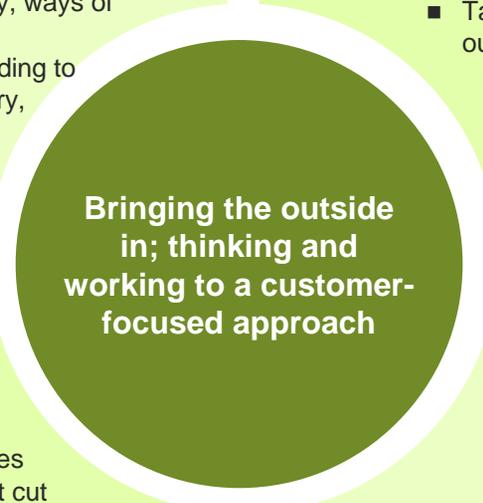


Introduction



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.

WHAT JOURNEY MAPPING IS USED FOR



Understanding the reality of people's lives

CASE STUDY

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

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

Designing and overhauling systems and processes

CASE STUDY

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

- 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

Facilitating inter- and cross-departmental working

CASE STUDY

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

- 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

Making decisions

CASE STUDY

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

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

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

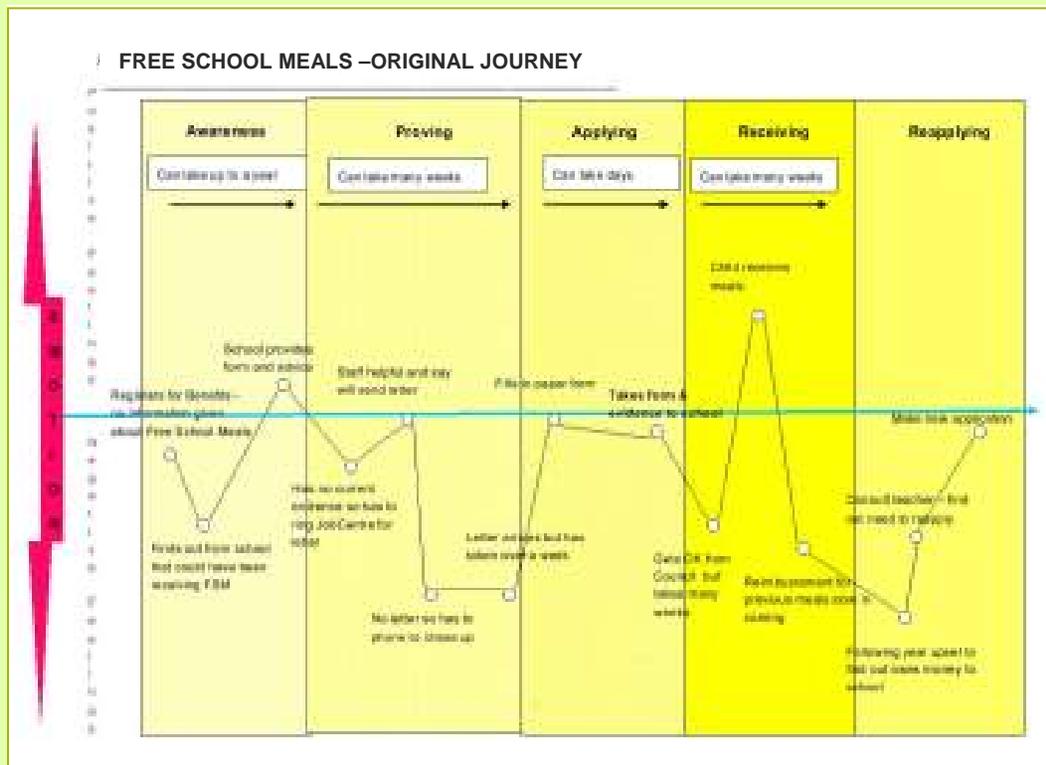
Tameside Free School Meals

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

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.

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).



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.



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

Introduction

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.

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.

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.



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.



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.



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.

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.