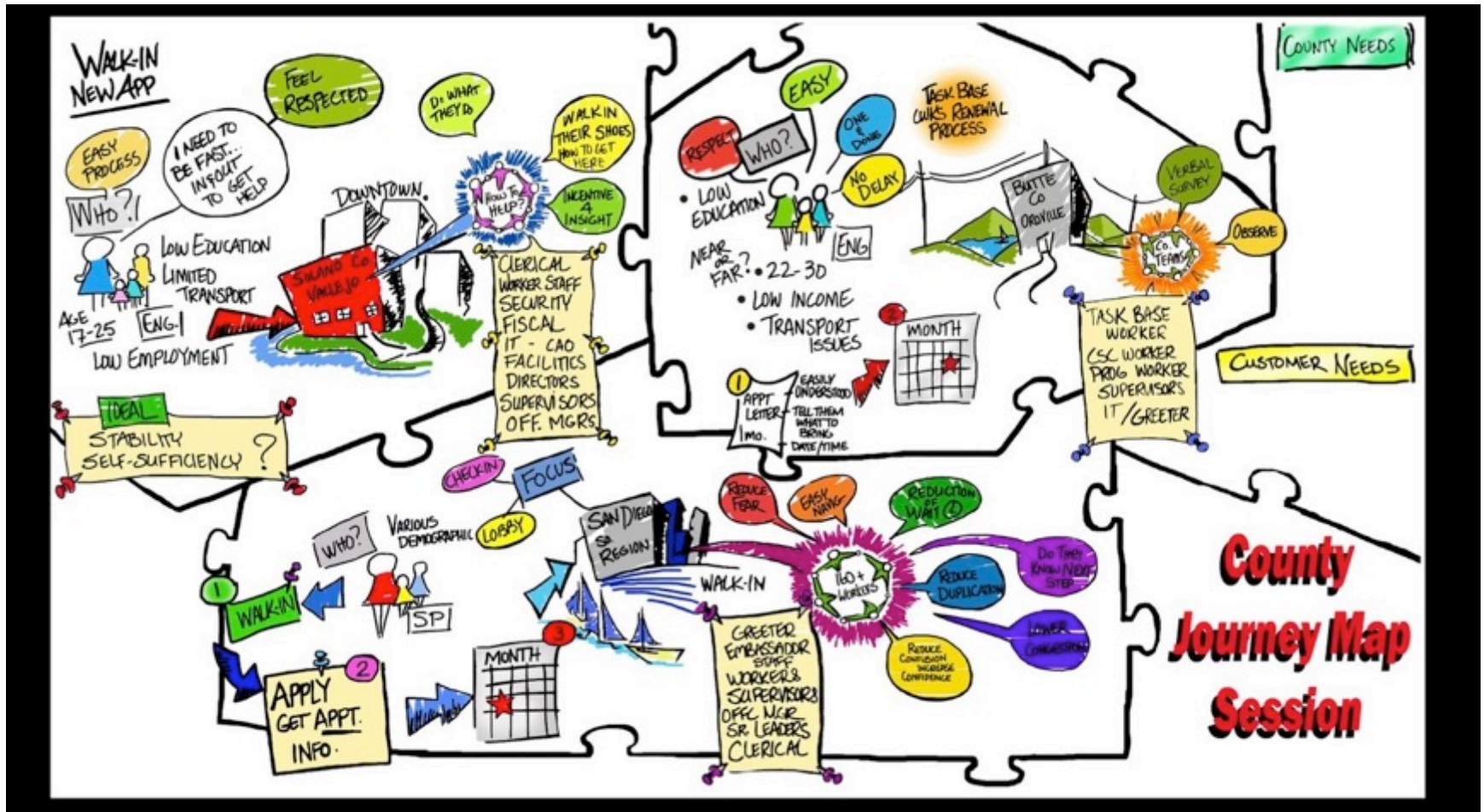


# CUSTOMER JOURNEY MAPPING



# WELCOME

**Jo Weber-** CWDA/CFPIC Project Director

**Kouji Nakata-** Team Consultant

**Susan Shippelhoute-** Administrative Analyst  
Associate, Butte County

**Cindy Sottana-** Clerical Operations Manager,  
Solano County

**Adriana Ramirez-** Human Services Program  
Manager, San Diego County

# WHY WE PICKED THIS



# Journey Mapping

**Design Process Around the Customer!**

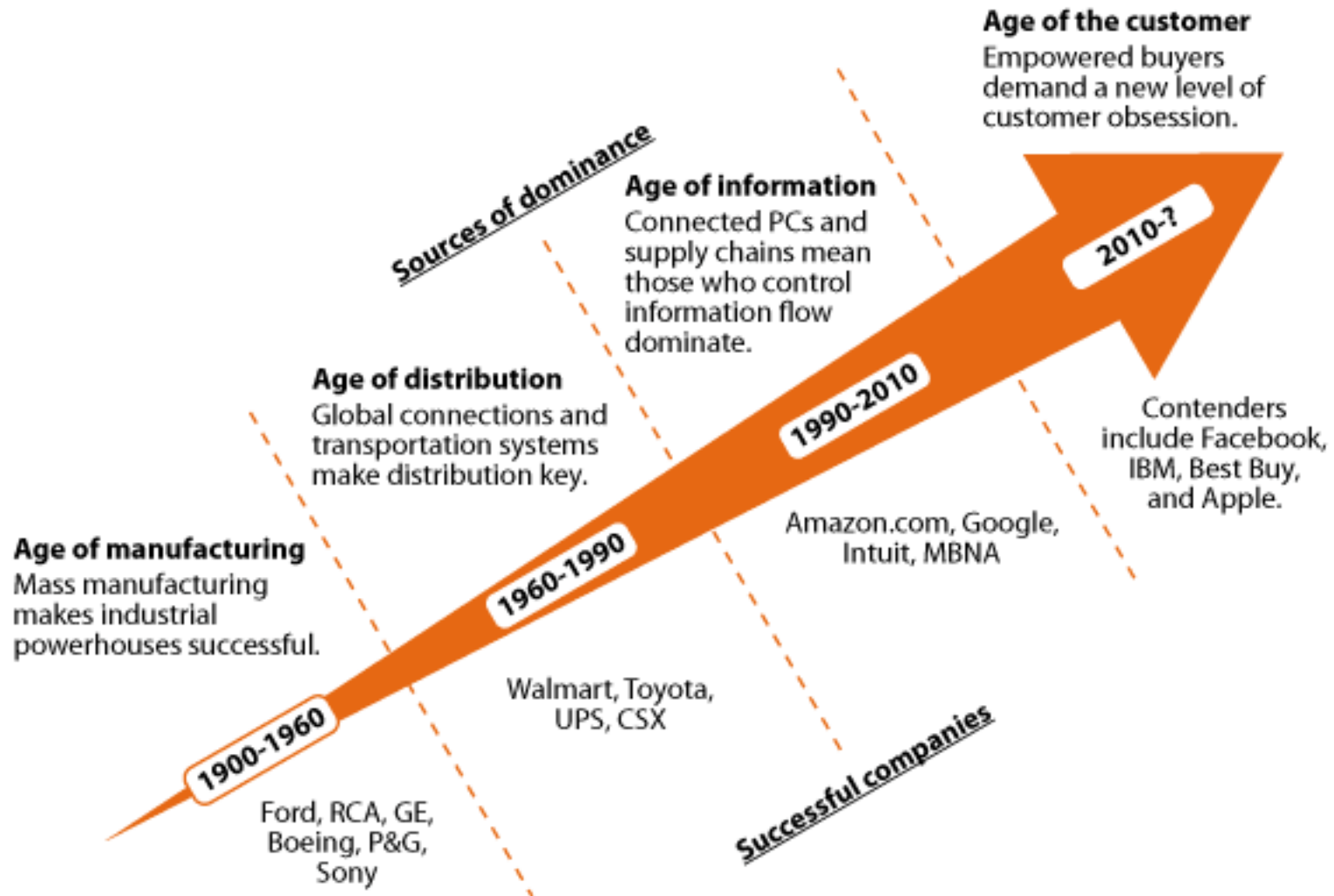
**Customer is Happy**

**Business is Happy**

**Staff is Happy**

**EVERYBODY WINS!**

# AGE OF THE CUSTOMER



Source: June 6, 2011, "Competitive Strategy In The Age Of The Customer" Forrester report

# YOUR MOTHER TEST



# WHY BOTTOM-UP DESIGN?



# TOP DOWN DESIGN





# STEPS-JOURNEY MAPPING

- **Define goals and metrics**
- **Select customer segment- “Persona”**
- **Sketch initial journey map-phases**
- **Observe for insight and empathy**
- **Summarize observations-build the map**
- **Identify key pain points**
- **Prioritize action steps**
- **Implement action steps and measure impact**

# GOALS AND METRICS

## 1. SAME DAY SERVICES

- HIGHER PRODUCTIVITY

## 2. HIGHER CUSTOMER SERVICE

- FASTER, BETTER, MORE INFORMED

- REVAMP SURVEY CARD

## MEASUREMENTS

1. Time-Appl. thru disposition - Lower Avg. (Same Day)
2. % Complete (Same Day)
3. Less Complaints, Inquiry Calls (Cust. Svc)

# Personna / Demographics : FAIRFIELD



**EN / Multi-  
Lingual**



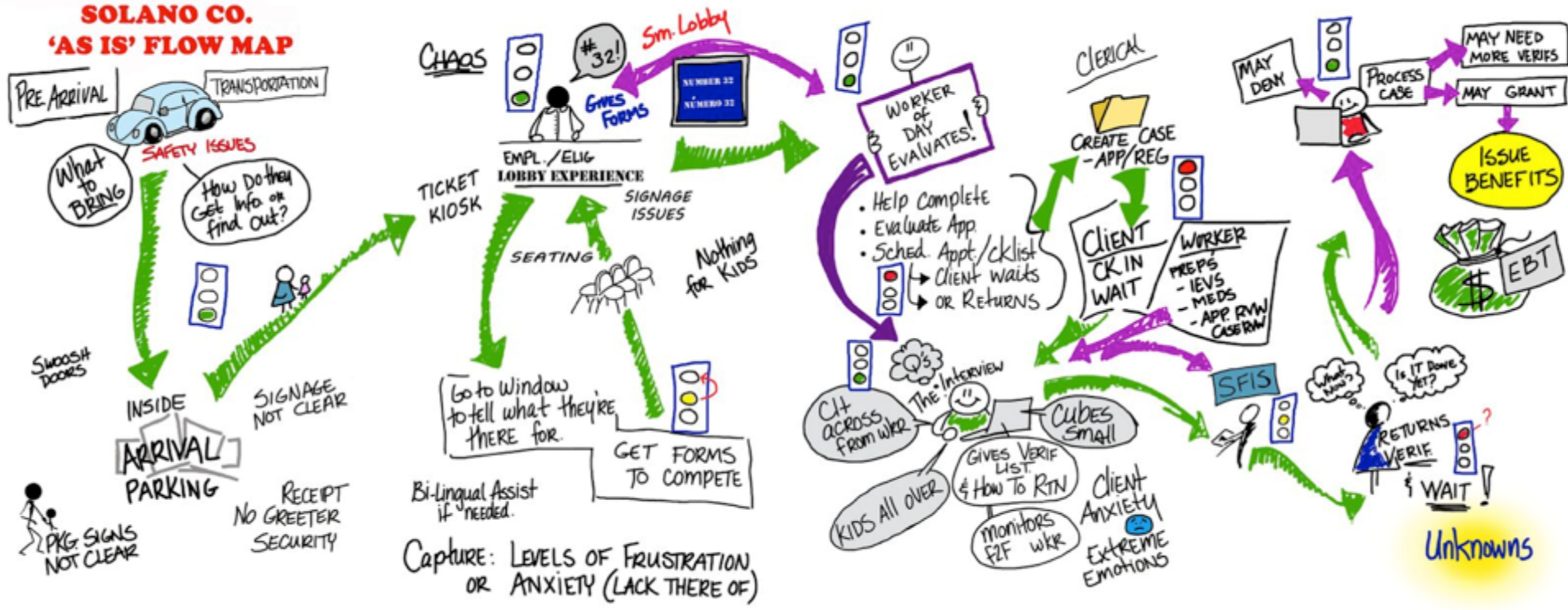
**100% Poverty Limit**

**CWKs/MC**

**1 & 2 Parent  
Households  
17 - 25 Yr / Age  
w/ Kids in Tow**

# INITIAL MAPPING

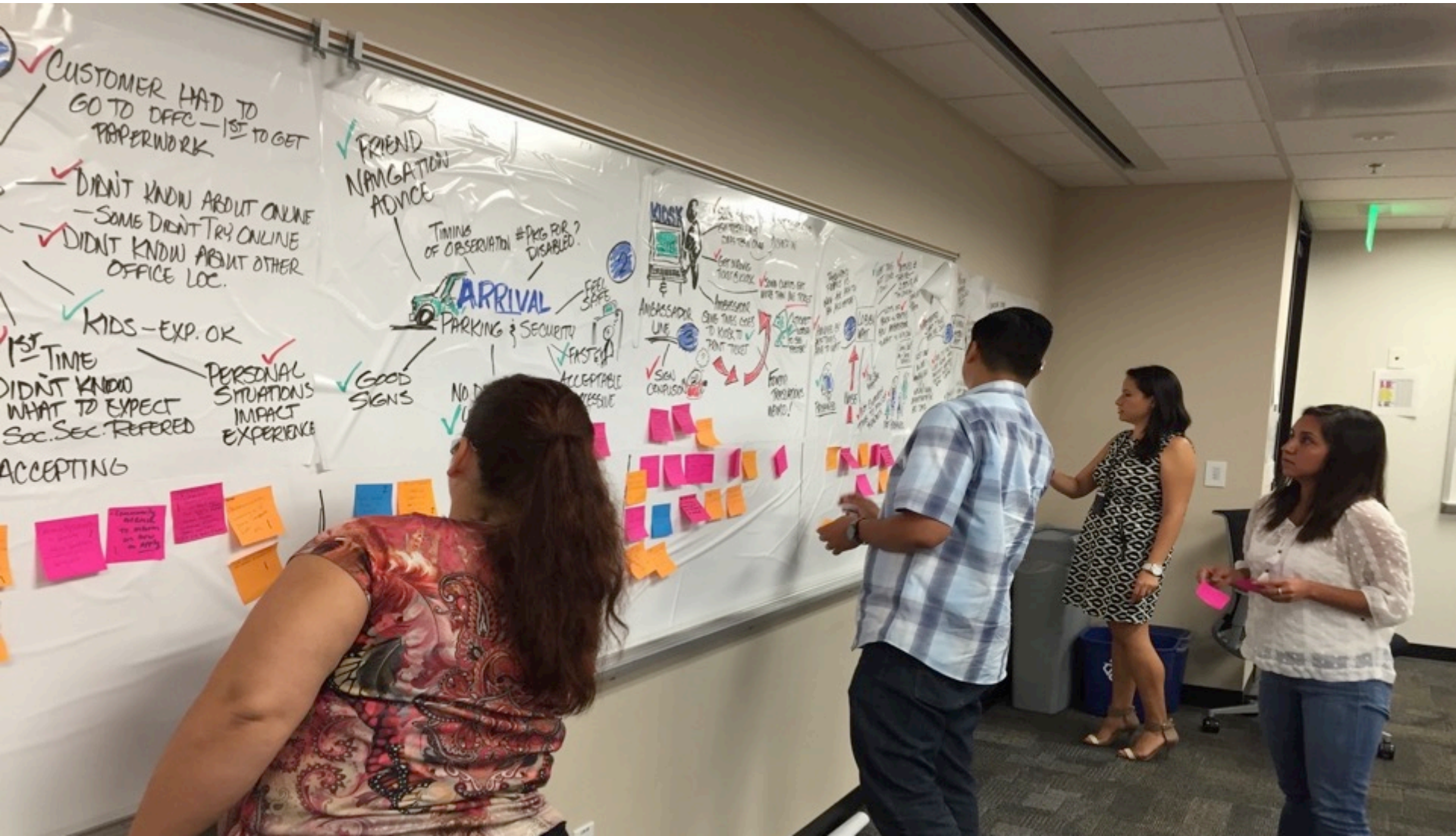
## SOLANO CO. 'AS IS' FLOW MAP



# OBSERVE FOR INSIGHT & EMPATHY



# SUMMARIZE OBSERVATIONS



# #1 PreArrival

## Online

- Marketing: Better BCW★
- CW Online Application
- Didn't know about website or could Apply online
- Apply options Unknown
- Unaware of BCW
- Radio Announce-RE: Online
  - Billboards
  - Posters
  - TV Spots
- YouTube Video RE:
- Preparedness/What to Bring

↑  
Include w/ Mktg

## Transportation

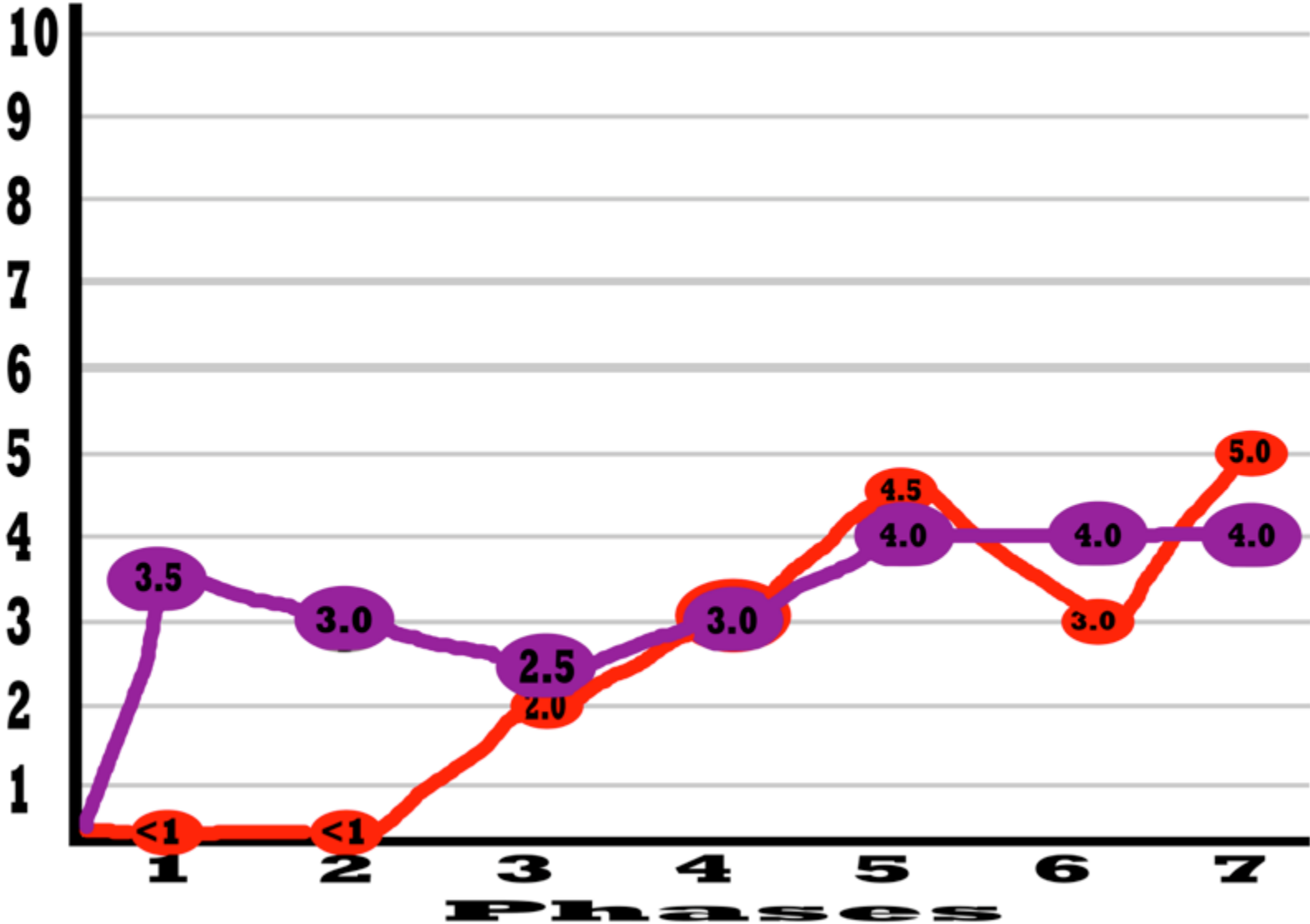
- Dangerous Xing (HWY 12)
- Signage (Inadequate)★
  - Signs
- No Clear Directions
- No Hwy Signs I-80/Hwy12 Beck
- No issue; knew how to get to Office.
- Unsafe Xing

## Schedules

- Limited Bus Schedules
- Bus Sched. "OK" for locals
- Free Shuttle
- Better Outreach at Prime Locations
- ★ - Community Partners
  - WIC / Library - Process In's
- Align Schedules:
  - Bus
  - Appt

# Customer Satisfaction

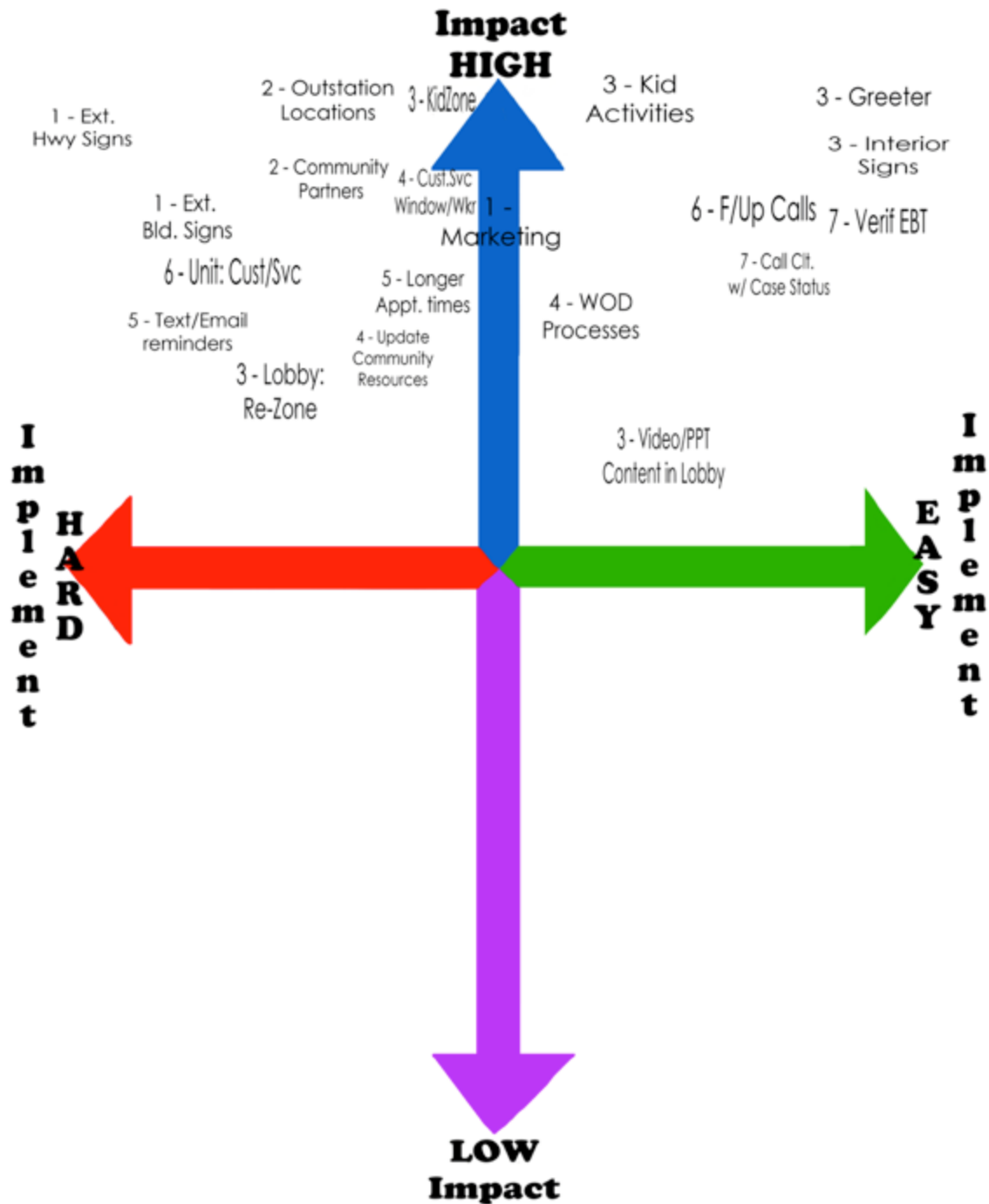
COUNTY WORKERS/STAFF  
CLIENT





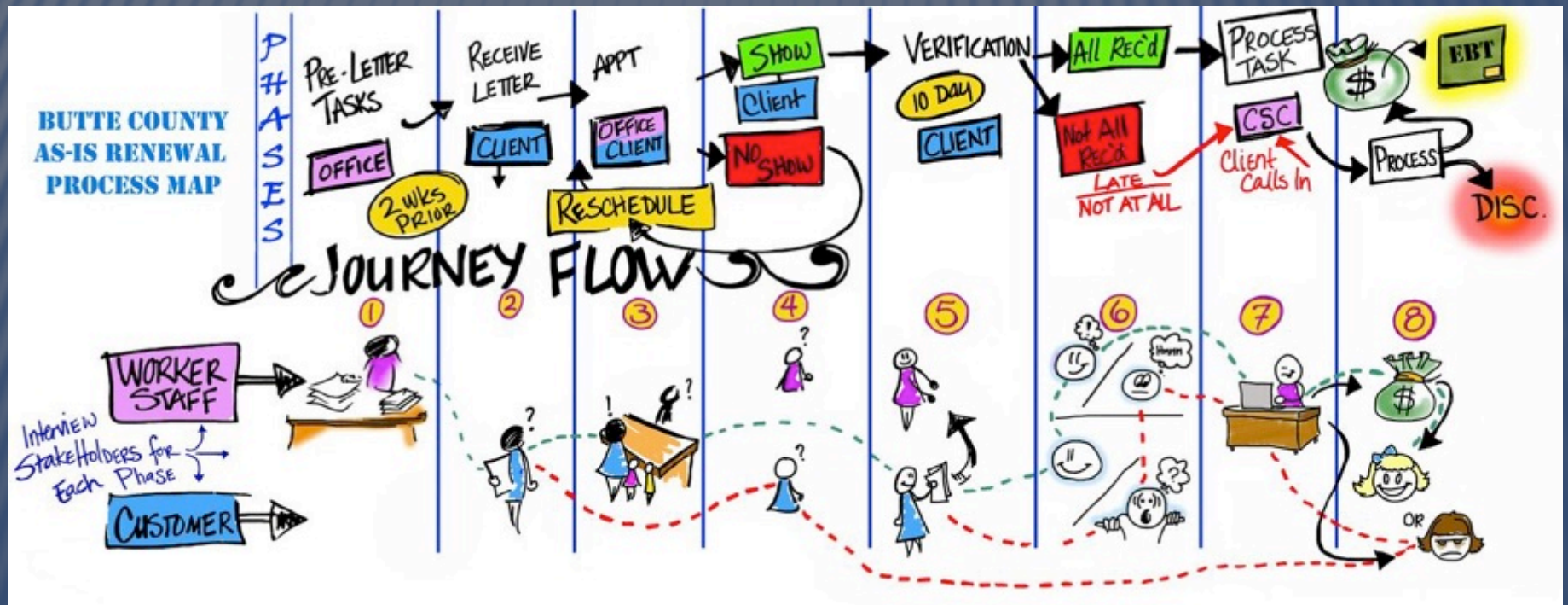
# PRIORITIZE ACTION STEPS





# BUTTE COUNTY

## JOURNEY MAPPING



# OUR TEAM

## Department of Employment And Social Services



# LEARNING



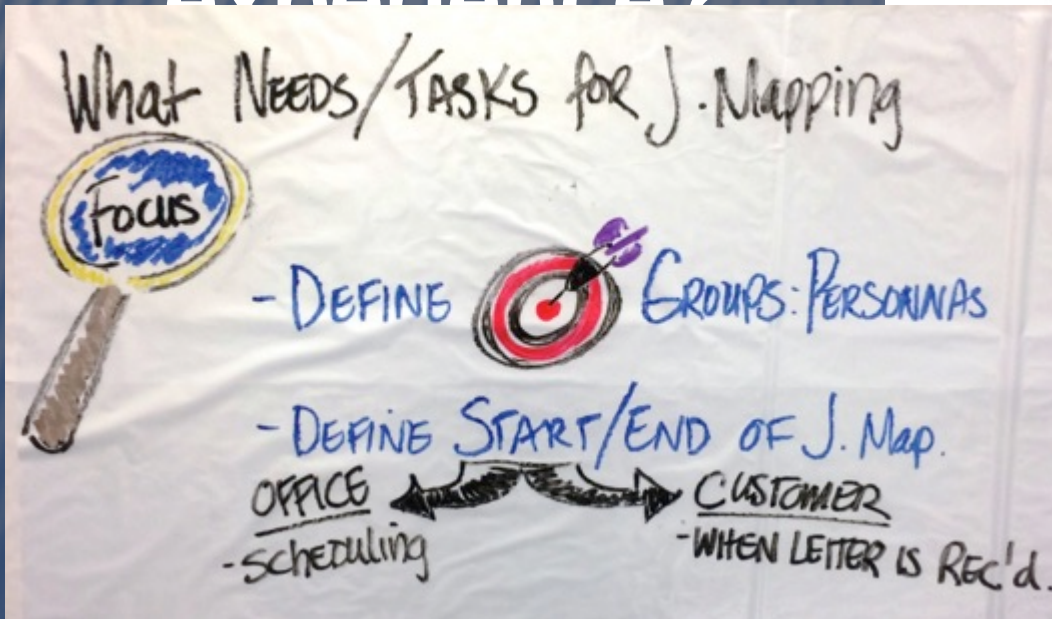
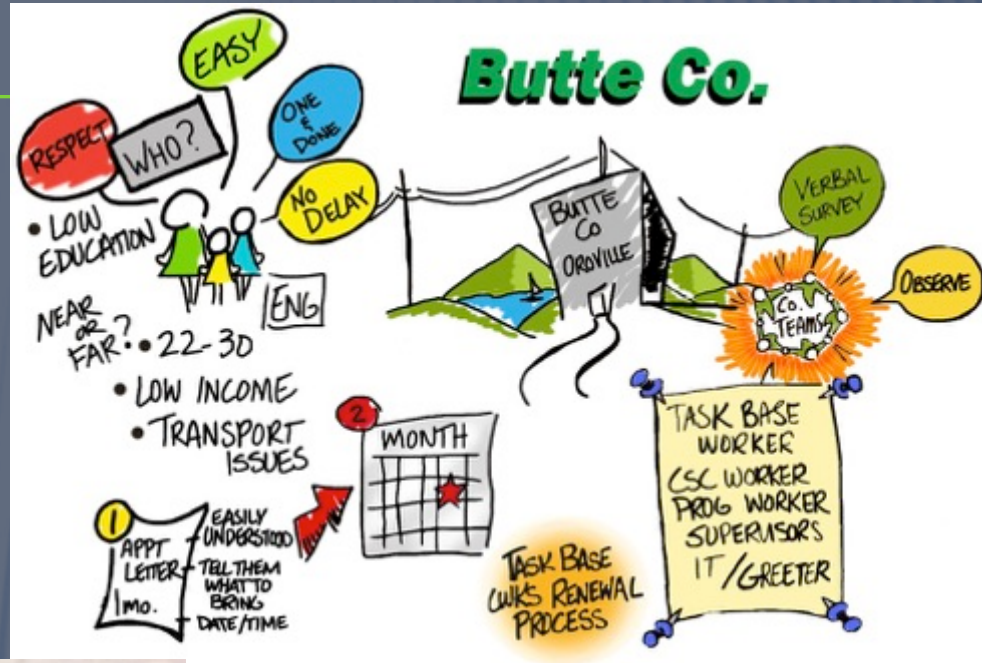
Focused on being aware of our own:

- Thoughts
- Feelings
- Experiences



# BEGINNING

Where do we want to improve customer experience?



## CaIWORKs Recertification

Relationship between Task Based Units and the Customer Service Center



# DE-BRIEF

**GOALS**

- ★ Don't lose sight of Relationship - Customer - CSC
- ★ ① MAKE CSL PROCESS SMOOTHER
  - REDUCE SHUFFLE
  - REDUCE INQUIRIES
- ② CWKS RECERTS - Flow
- ★ ③ DECREASE No-SHOW
- ④ Address Communication
- ⑤ Completed RE's to mitigate UN-NECESSARY RE-APPS.
- ⑥ REDUCE Human Error Rate
- ★ ⑦ ↑ TRUST = ↓ INQUIRIES
  - Call Count

# OBSERVATIONS

## The Observation!

### WHO

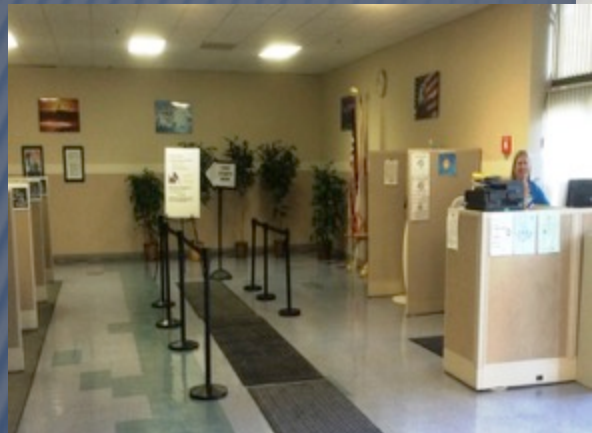
- LEAD WRKS

### WHERE (OR) What Point?

- Lobby
  - CHICO
  - ORVILLE
- NEXT STEPS (POST APPT)
  - WORKER

### METHODS

- Interview
  - PHONE & IN PERSON
- Observation
  - WALK W/ CH EXPERIENCE
- SURVEYS
- Empathize





# READY TO GO



GOALS & MEASUREMENTS

DECREASE - STRESS  
- CONFUSION

REDUCE PROCESSING

LESS ANGRY CALLS<sup>(M)</sup>  
- OVERALL CALLS

INCREASE GRANTED

LESS-O/Ps<sup>(M)</sup>  
- NO SHOWS<sup>(M)</sup>

# PRIORITIES

## Pre Arrival – Before the Recertification

- Out-station Locations
- Send letter only
- Plan CalWORKs phone interviews with select clients
- Phone calls to clients

## Arrival – Attending the Appointment

- Reduce or eliminate the Recertification Packet
- Bus Pass
- Reward for timeliness
  - If Late – Inform clients: help to reschedule
- In-office child care
- Kid Zone

## After – What is expected now?

- Recertification folder
  - Process (what to expect now), Calendar, Phone numbers
- IVR simplification and training
- Script/ Checklist



# COMMITTEES

## Gartner Quadrant

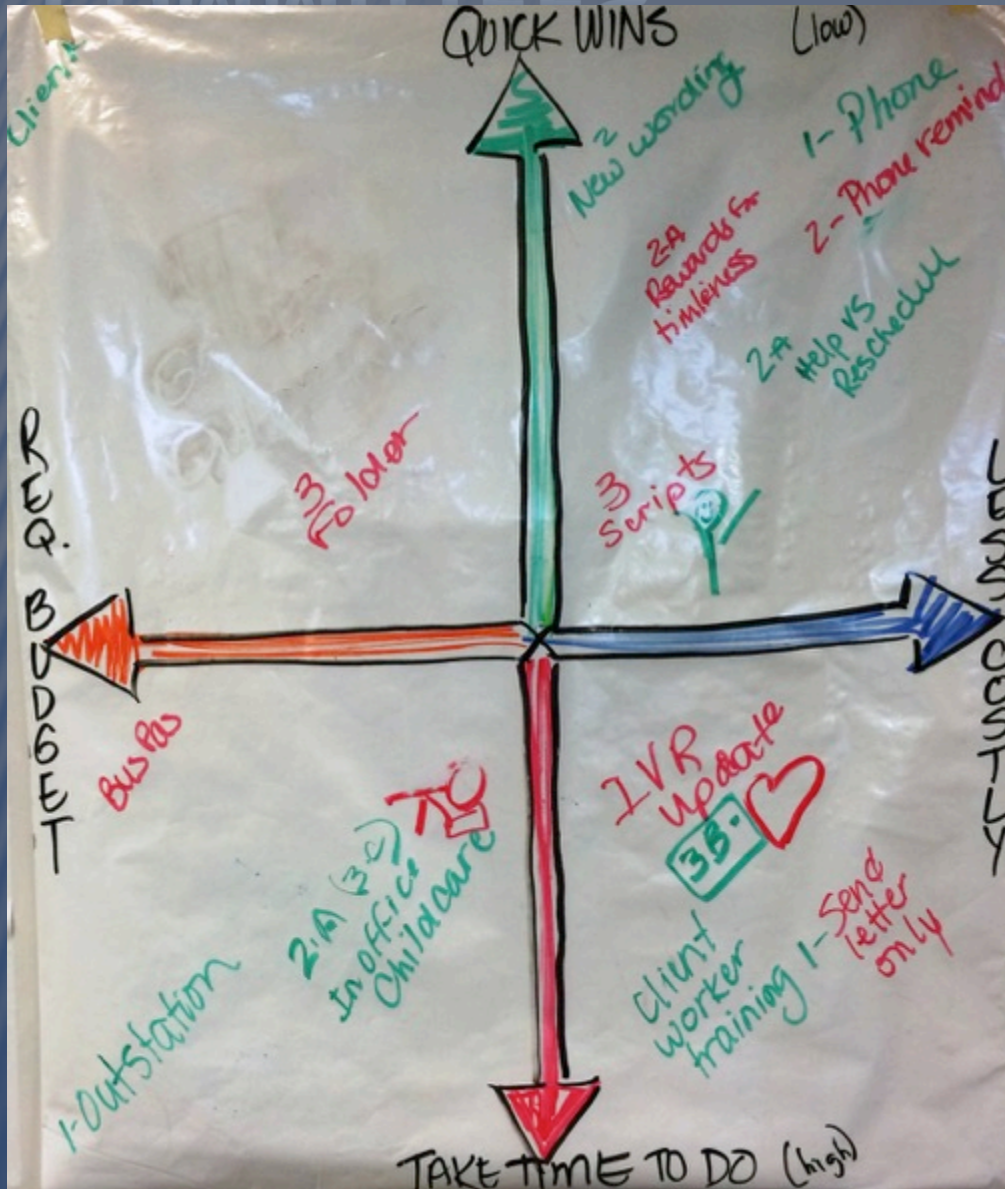
### Committees

New Letter

Script

Folder

Upcoming



# OUTCOMES

Implemented ideas identified during Journey Mapping process.

Five projects currently being researched for implementation.

Identified areas that were not within CalWORKs regulations.

Brainstorming to come up with more ideas!



# CONCLUSION

**Journey Mapping gave us a positive perspective on how to resolve issues**

**Together we were able to gather the customers experience from every stage of the process!!!**

*People WANT TO BE HELPFUL, if GIVEN THE Opportunity!*



**We are excited to start on another journey mapping process to improve the customer experience.**

**Being able to work together, creating a plan as a group and focusing on a positive change.**



# Solano County's Team

Consisted of 11 staff from:



- Administrators
- Managers
  - Employment & Eligibility Service Manager
  - Clerical Operations Manager
- Supervisors
  - Eligibility Benefits Specialist Supervisors
  - Clerical Operations Supervisor
- Line Staff
  - Eligibility Benefits Specialist Workers
  - Office Assistant III's

# Team Activity

## Group Visited a local GYM

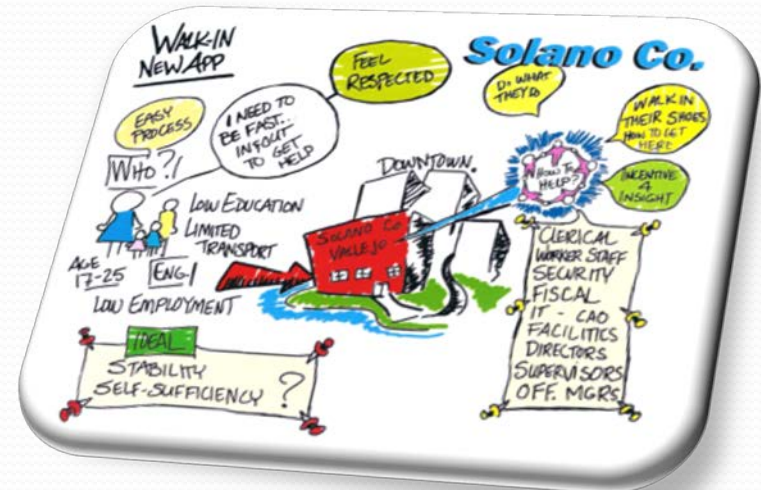


- What was learned?
  - Client's point of view
  - A better understanding of a customer's journey
  - Greater awareness of the customer's perspective

# Project

- Same Day Service/Initial Application Process

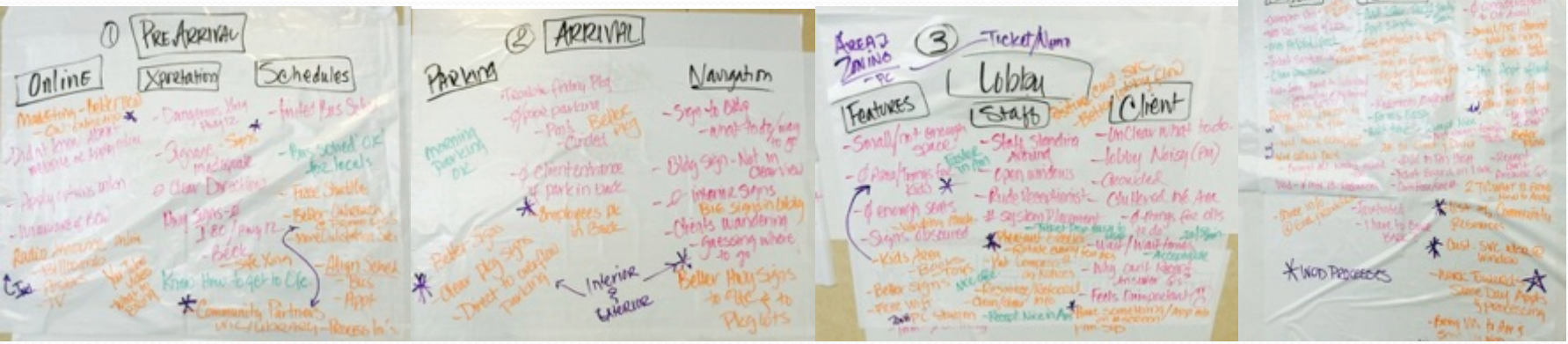
- Pre-arrival Experience
- Parking Lot
- Arrival
- Lobby Monitor
- Lobby experience
- Application Process same day





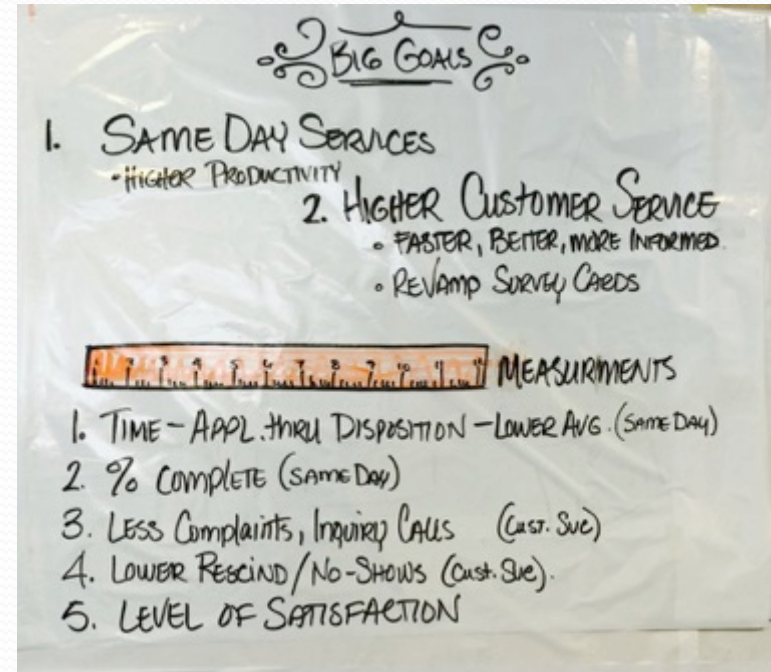
# Experience

- What was learned?
  - Need better signage
  - Process not as simple as we think it is
  - Need to improve the customer's experience both before and during their time with us
  - Bigger picture from customers perspective
  - Customer interviews were an eye opener



# Opportunities

- Brainstorming session
  - Pre-Arrival and Arrival
  - Lobby Monitors
  - Same Day Services





# COUNTY OF SAN DIEGO

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*Journey Mapping Experience*

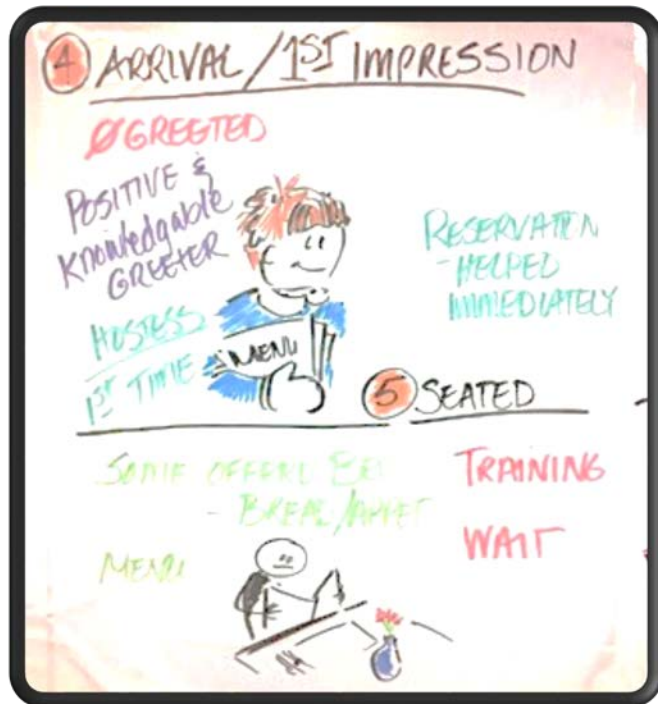


Our team consisted of 34 staff from:



- Family Resource Centers
  - Supervising Human Services Specialist
  - Human Services Specialists
- Program Support
- Quality Control

## Visit a New Restaurant

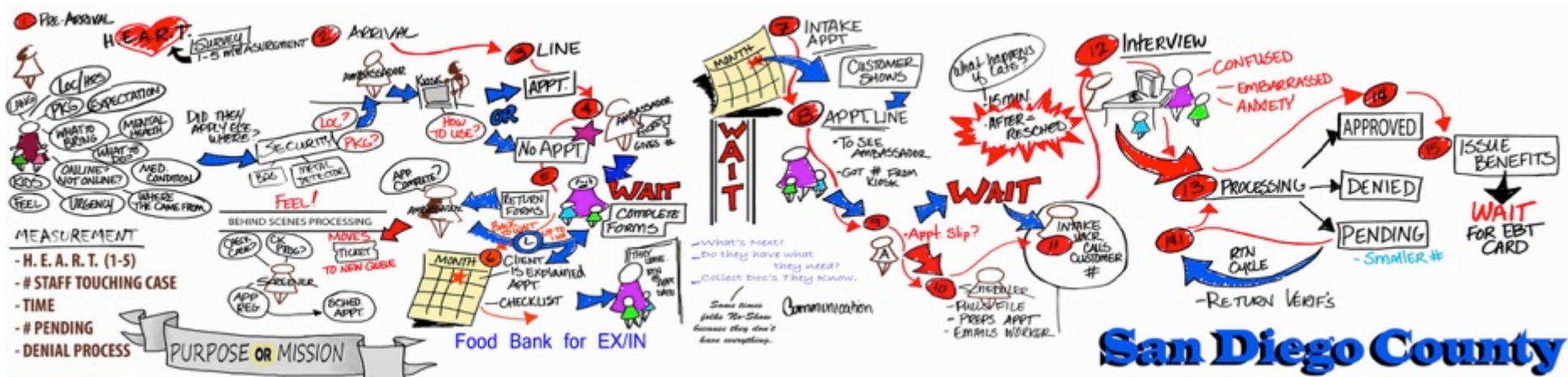


- What was learned?
  - Customer's point of view
  - A better understanding of a customer's journey
  - Greater awareness of the customer's perspective

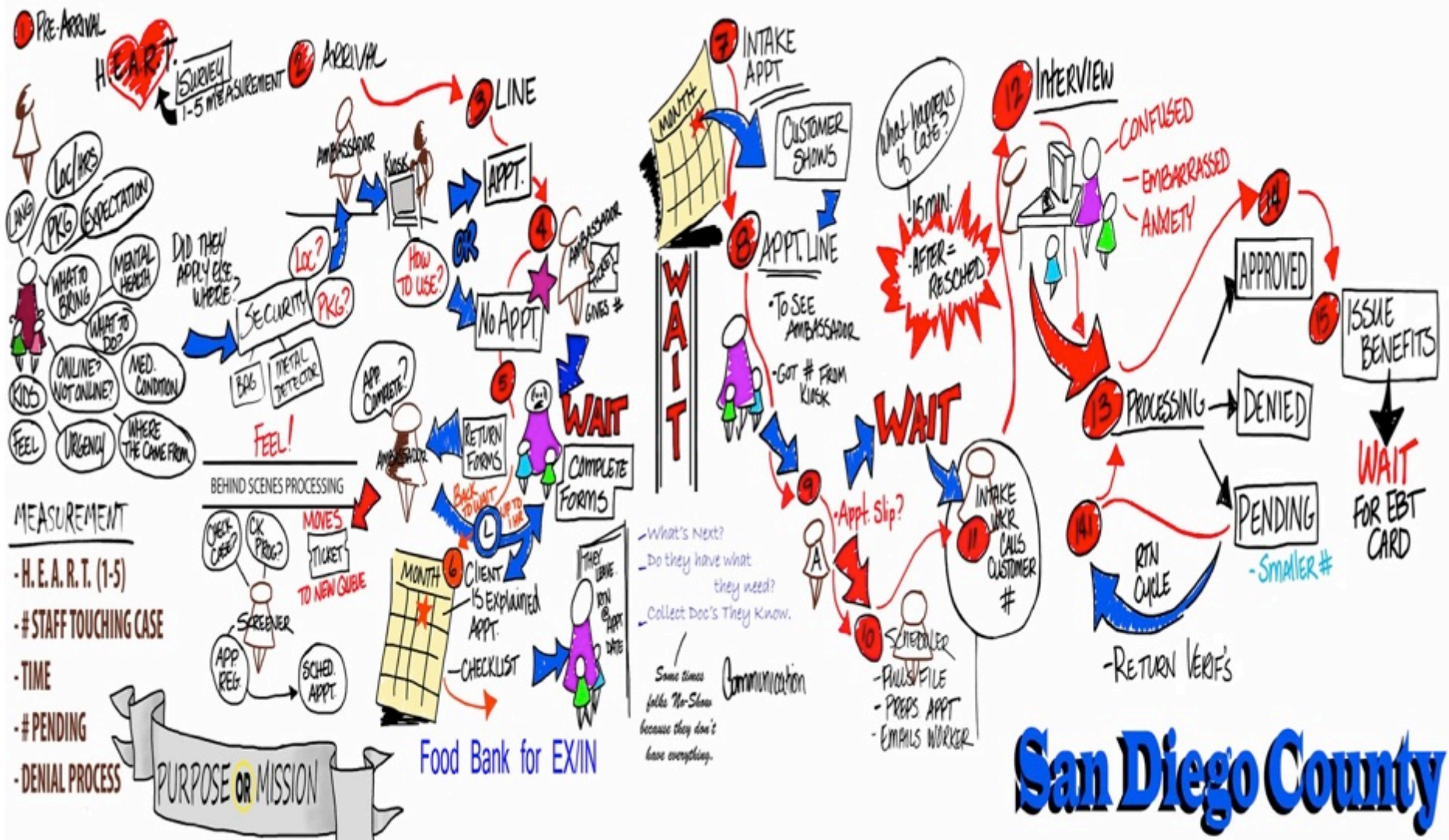
- Walk-in Initial Application Process
  - Pre-arrival
  - Arrival
  - Ambassador's desk
  - Lobby experience
  - Appointment scheduled



- What was learned?
  - It's a complicated process
  - Break down of the process
  - Bigger picture from customer's perspective
  - Understanding the customer journey



# APPLICATION JOURNEY MAP



# San Diego County





- Group Recommendations
  - Arrival
  - Ambassador station
  - Lobby wait



# FINAL THOUGHTS

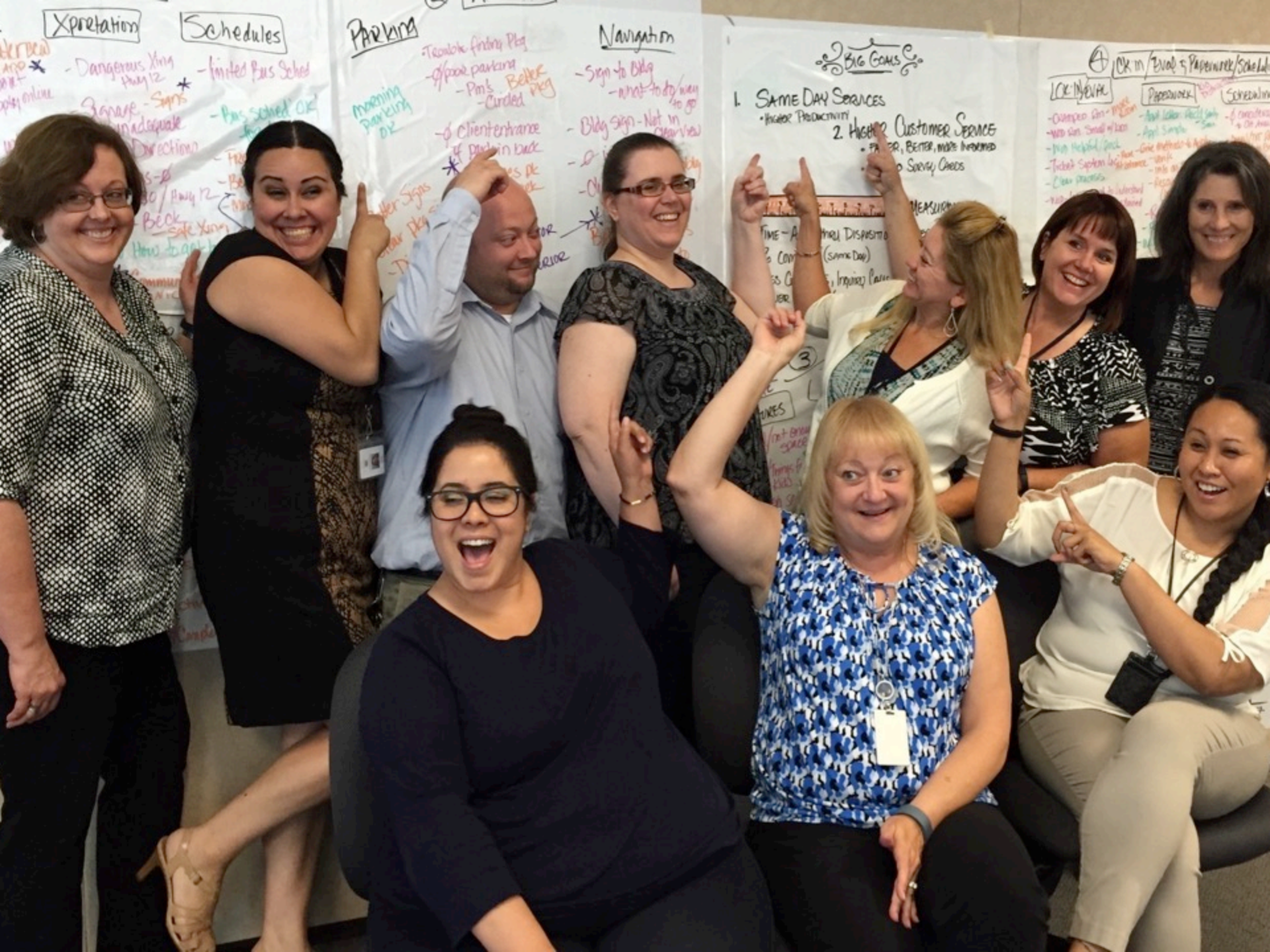


- Overall evaluation
- Next Steps



# **LESSONS LEARNED & NEXT STEPS**

- **Energizes and engages staff**
  - **Bottom up innovation works**
  - **Significant driver of culture change**
  - **Wide application**
  - **Better than we thought**
- 
- **If you are interested leave your business card or contact Jo Weber**



### Xpretation

### Schedules

### PARKING

### Navigation

### BIG GOALS

### LOCK IN/MENTAL

- Dangerous Xing May 12  
 - limited Paus Sched  
 - Safe - Signs  
 - Inadequate  
 - Directions  
 - May 12  
 - Beck  
 - safe Xing  
 - How to...

- Teambk Friday Pkg  
 - offsite parking  
 - Pm's Better Pkg  
 - Curled  
 - Client entrance  
 - if Park in back  
 - Signs  
 - Pkg  
 - Morning Parking OK

- Sign to Bldg  
 - what to do when to go  
 - Bldg sign - Not in clear view  
 - Sign  
 - Sign

1. SAME DAY SERVICES  
 - Higher Productivity  
 2. HIGHER CUSTOMER SERVICE  
 - FASTER, BETTER, MORE INVOLVED  
 - Social, Chees

- Checked in  
 - No sign Small of lines  
 - No helpful sign  
 - Ticket System  
 - Clear process  
 - No sign to help  
 - No sign to help  
 - No sign to help

Woman with glasses and patterned top, smiling.

Woman in black dress, pointing upwards.

Man in light blue shirt, pointing upwards.

Woman in black patterned dress, smiling.

Woman in white top, pointing upwards.

Woman in black and white patterned top, smiling.

Woman in black top, smiling.

Woman in dark blue top, sitting and smiling broadly.

Woman in blue patterned top, sitting and smiling.

Woman in white top, sitting and smiling.