CUSTOMER JOURNEY MAPPING

CWDA 2015 CONFERENCE
WELCOME

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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

**Sources of dominance**

**Age of manufacturing**
Mass manufacturing makes industrial powerhouses successful.

**Age of distribution**
Global connections and transportation systems make distribution key.

**Age of information**
Connected PCs and supply chains mean those who control information flow dominate.

**Age of the customer**
Empowered buyers demand a new level of customer obsession.

**2010-?**
Contenders include Facebook, IBM, Best Buy, and Apple.

Successful companies:
- Amazon.com, Google, Intuit, MBNA
- Walmart, Toyota, UPS, CSX
- Ford, RCA, GE, Boeing, P&G, Sony

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

Source: Forrester Research, Inc.
YOUR MOTHER TEST
WHY BOTTOM-UP 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

Walk-In New App.

EN / Multi-Lingual

CWKs/MC

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

100% Poverty Limit
INTITIAL MAPPING

SOLANO CO. ‘AS IS’ FLOW MAP

Pre-Arrival
- Transportation
  - Safety Issues
    - What to Bring
      - How do they get info or find out?

Arrival
- PAG signs not clear
  - No greater security

Parking
- Inside
  - Signage not clear
    - Go to window to tell what they're there for

Signage Issues
- Seating
  - Nothing for kids
  - Bi-lingual assist if needed

Ticket Kiosk
- Get forms to compete
  - Capture: Levels of frustration or anxiety (lack thereof)

Lobby Experience
- Chaos
  - #32!

Sign in Lobby
- Worker of the day evaluates
  - Help complete forms
  - Evaluate App
  - Schedule appointment/c封锁
  - Client waits or returns

Clerical
- Create case
  - App/Reg

Client CK IN WAIT
- CH across form

Interview
- Gives verification list
  - How to run
  - Monitors EBT wire

Unkowns
- Returns verification
- Child anxiety extreme emotions

Unknowns
- May need more verific
- May grant

Process Case
- May deny

Issue Benefits
- EBT

Adults
- EBT

Client Anxiety
- EBT
OBSERVE FOR INSIGHT & EMPATHY
<table>
<thead>
<tr>
<th>#1 PreArrival</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online</strong></td>
</tr>
<tr>
<td>- Marketing: Better BCW</td>
</tr>
<tr>
<td>- CW Online Application</td>
</tr>
<tr>
<td>- Didn’t know about website or could apply online</td>
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<tr>
<td>- Apply options Unknown</td>
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<tr>
<td>- Unaware of BCW</td>
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<tr>
<td>- Radio Announce-RE: Online</td>
</tr>
<tr>
<td>- Billboards</td>
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<tr>
<td>- Posters</td>
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<tr>
<td>- TV Spots</td>
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<tr>
<td>- YouTube Video RE: Preparedness/What to Bring</td>
</tr>
<tr>
<td><strong>Transportation</strong></td>
</tr>
<tr>
<td>- Dangerous Xing (HWY 12)</td>
</tr>
<tr>
<td>- Signage (Inadequate)</td>
</tr>
<tr>
<td>- Signs</td>
</tr>
<tr>
<td>- No Clear Directions</td>
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<tr>
<td>- No Hwy Signs I-80/Hwy12 Beck</td>
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<tr>
<td>- No issue; knew how to get to Office.</td>
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<tr>
<td>- Unsafe Xing</td>
</tr>
<tr>
<td><strong>Schedules</strong></td>
</tr>
<tr>
<td>- Limited Bus Schedules</td>
</tr>
<tr>
<td>- Bus Sched. “OK” for locals</td>
</tr>
<tr>
<td>- Free Shuttle</td>
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<tr>
<td>- Better Outreach at Prime Locations</td>
</tr>
<tr>
<td>- Community Partners WIC/Library - Process In’s</td>
</tr>
<tr>
<td>- Align Schedules:</td>
</tr>
<tr>
<td>- Bus</td>
</tr>
<tr>
<td>- Appt</td>
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</tbody>
</table>
PRIORITIZE ACTION STEPS
BUTTE COUNTY
JOURNEY MAPPING
OUR TEAM
Department of Employment And Social Services

Butte County
EMPLOYMENT & SOCIAL SERVICES
Focused on being aware of our own:

- Thoughts
- Feelings
- Experiences
Where do we want to improve customer experience?

CalWORKs Recertification

Relationship between Task Based Units and the Customer Service Center
DE-BRIEF

GOALS

1. Make CSC Process Smoother
   - Reduce Shuffle
   - Reduce Inquiries
2. CWKS Recerts - Flow
3. Decrease No-Show
4. Address Communication
5. Completed RE's to mitigate unnecessary RE-Apps.
6. Reduce Human Error Rate
7. Trust = Inquiries - Call Count

Don't lose sight of relationship - Customer - CSC
The Observation!

WHO
- LEAD WORKS

WHERE (or) WHAT POINT?
- Lobby
- CHICO
- OROVILLE WORKER

METHODS
- Interview
- Phone & In Person
- Observation
- Walk With CH Experience
- Surveys
- Empathize

NEXT STEPS
(POST APPT)
READY TO GO

GOALS & MEASUREMENTS

DECREASE STRESS
- Confusion

REDUCE PROCESSING

LESS ANGRY CALLS
- OVERALL CALLS

INCREASE GRANTED

LESS O/Ps
- No Shows

Butte County
EMPLOYMENT & SOCIAL SERVICES
PRIORITY

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
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!
Journey Mapping gave us a positive perspective on how to resolve issues. Being able to work together, creating a plan as a group and focusing on a positive change.

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

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

Journey Mapping Experience
Our team consisted of 34 staff from:

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

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
PROJECT

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

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

- 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