Discovering Insights for Improvement with Journey Mapping

Presented by:

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Enterprise Business Architect
**University of Oregon**

Who am I?!

Hi, I'm Kelsey Lunsmann!

- Enterprise Business Architect at the University of Oregon

- Previously, an IT business analyst in our PMO at the UO

- Earned my Certificate of Capability in Business Analysis (CCBA) in August 2021

- Prosci Certified Change Practitioner (April 2020)

- Let's connect → LinkedIn Profile: https://www.linkedin.com/in/kelseylunsmann/

- Fun fact! My husband and I have a small alpaca farm in Springfield, Oregon.

UNIVERSITY OF OREGON
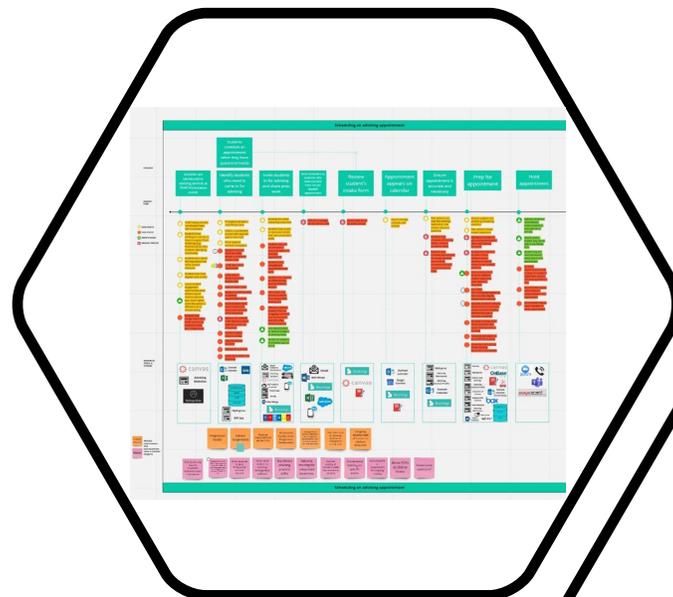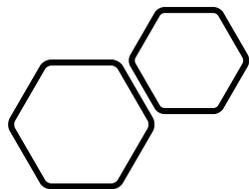
Journey Mapping

is designed to put you in the shoes of your "audience" or a specific population to build empathy for their individual and unique needs

Employee Persona D

Tenure-Track Faculty

Name: MONICA (she/her)

Job Title / Department: Associate Professor, College of Pharmacy

PROFILE	Background	Key attributes E.g. years at OSU, prior work experience, demographic characteristics, family, etc.	• PhD in Pharmaceutical Sciences with additional post-doctoral training • Six years at OSU; began as Assistant Professor • Primary investigator researching focusing on cancer drug therapies • Lives in Corvallis with wife and two school-aged kids
	Values	What do they care about?	• Discovering new knowledge that can lead to more effective medical treatments • Mentoring graduate students who will contribute to her field
MOTIVATION	Goals	What are their overall goals?	• Promotion to full Professor at OSU within specified time frame • Manage her research lab and projects • Secure grant funding for projects • Publish book chapter and journal articles
	Needs & Wants	Based upon their background and where they are in life, what might they need or want?	• Opportunities to present at and attend conferences • Support with grant applications • Help navigating visa policies to hire an international graduate student
IMMEDIATE GOALS	Services	What are the key HR services they would interact with while pursuing their immediate goals?	•
	Desired Outcomes	As a result of interacting with the service, what would they expect?	•

Poll Time!

What's your experience level with journey mapping?

Presentation Journey

WHY & WHAT OF JOURNEY MAPPING

PERSONA DEVELOPMENT OVERVIEW

JOURNEY MAP OVERVIEW

JOURNEY MAPPING EXERCISE

Q & A
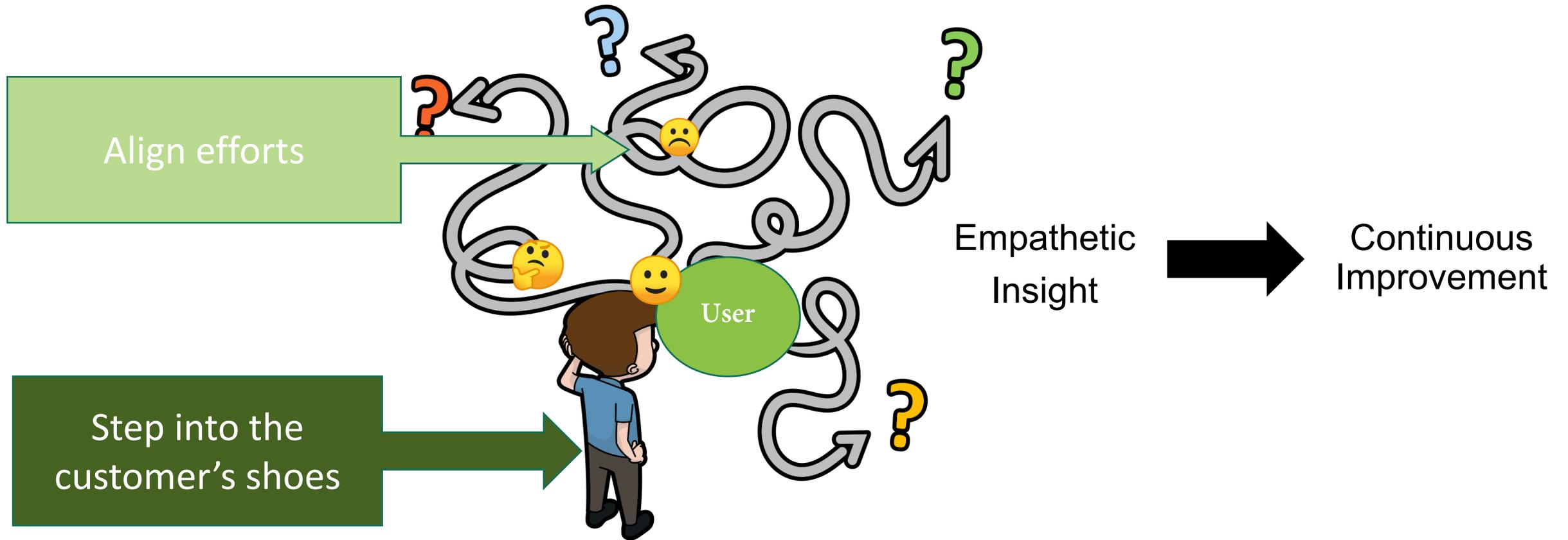
Why & What of Journey Mapping

What are journey maps?

A visual representation that describes an experience from the persona's perspective.

- Stages

- Activities

- Interactions

Consider what are they: thinking (needs), doing (actions, handoffs), feeling (happy, sad, mad).

Journey Maps & User Personas

Align efforts

Step into the customer's shoes

User

Empathetic Insight → Continuous Improvement

How is journey mapping applicable to me as a BA?

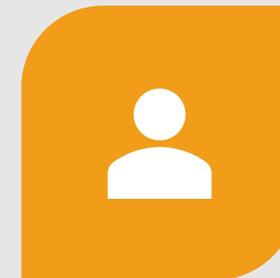NOT A TRADITIONAL TOOL, BUT YOU'RE PROBABLY ALREADY DOING SOME OF IT

JOURNEY MAPPING CAN BE A TOOL TO HELP UNDERSTAND THE CURRENT STATE OF A PROCESS AND ARTICULATE THE FUTURE STATE → **GAP ANALYSIS**

MOMENTS OF TRUTH AND PAIN POINTS CAN BE POTENTIAL **REQUIREMENTS**

PERSONAS CAN BE HELPFUL TOOL TO UNDERSTAND YOUR **STAKEHOLDERS**

JOURNEY MAPS CAN HELP CREATE USER STORIES FOR **TESTING**

Journey Maps

- Primarily capture subjective data (sentiments, mindsets, actions & experience) of *PEOPLE* going through a *JOURNEY* from their perspective(s)

- Captures key touchpoints & milestones in the journey

- Helpful for depicting *experience* waste via experience points that add little / no value to the experiencer

- Valuable to use personas to look at a journey from multiple perspectives

- Generally focused on a specific person/actor type or role (i.e. Customer, employee, agent, etc.)

- Generally broken down into phases or stages
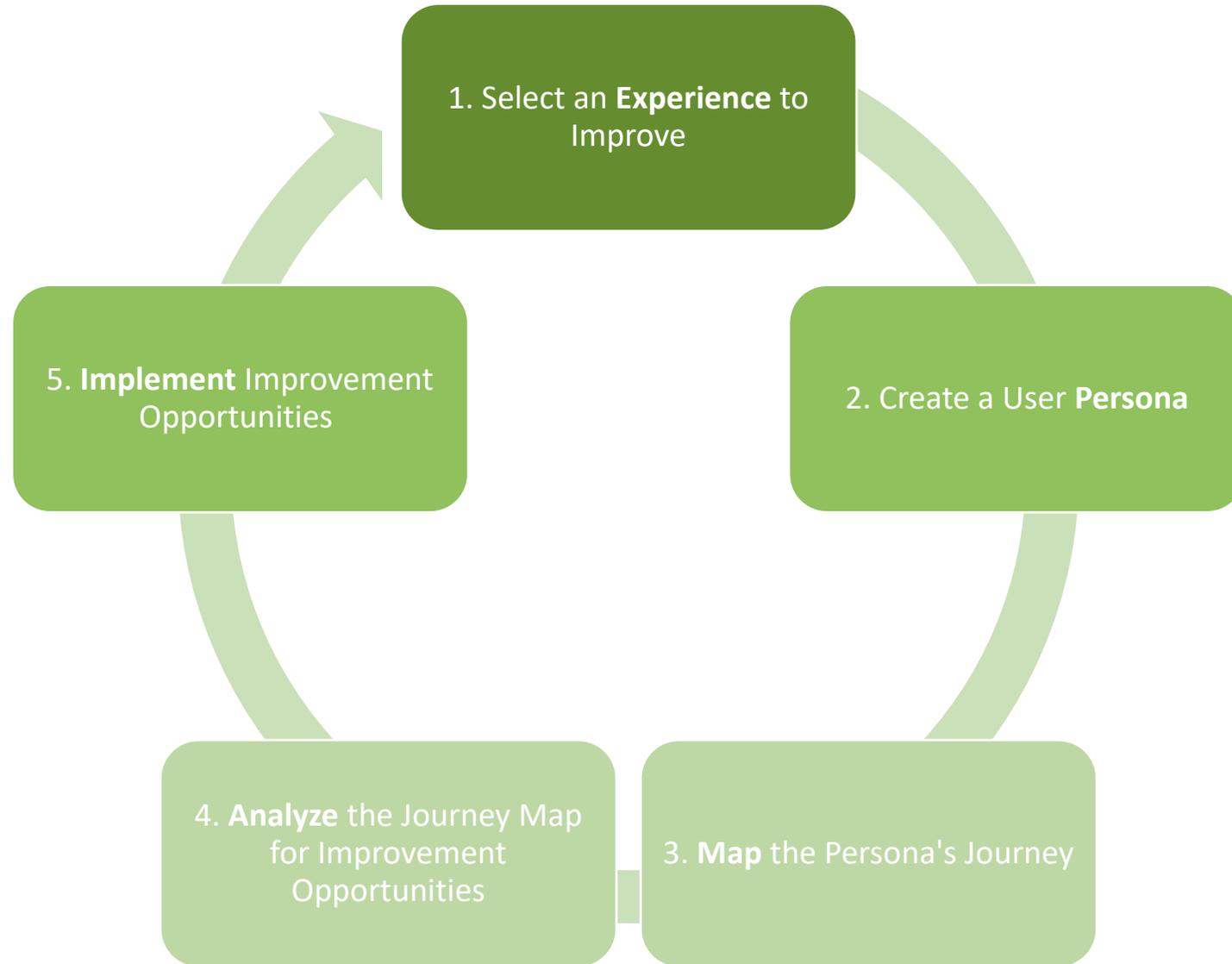
Process Maps

- Have a defined / agreed upon start & end point

- Built via engagement with stakeholders involved in the process / journey

- Typically note key systems and / or resources accessed

- Helpful to note bright ideas for improvement while mapping for later reference

- Use legends to define symbols & terms used

- Can be high-level or granular

- Primarily capture objective data (steps, duration, etc...) of a *THING* going through a *PROCESS* from the thing's perspective

- Captures key decision points & information flows in the process

- Helpful for depicting *process* waste via handoffs, loopbacks, etc... that add little / no value to the output

- Primarily interested solely in the perspective of the thing going through the process

- Can be further developed into a value stream map

- Illustrate system interconnections and dependencies

Why & What of Journey Mapping

Journey Maps Can Help Us

- Design equitable programs, services, and solutions that meet the needs of the people we serve
- Identify ways to improve peoples' experiences interacting with our services
- Start changing complex issues

Journey Mapping Process Overview

1. Select an **Experience** to Improve

2. Create a User **Persona**

3. **Map** the Persona's Journey

4. **Analyze** the Journey Map for Improvement Opportunities

5. **Implement** Improvement Opportunities

Why & What of Journey Mapping

How to Identify Experiences to Journey Map

- Alignment with strategic goals

- User retention in process is low

- Most frequently asked questions

- Website user data on what resource pages are most often accessed that explain a process

- Where are most errors made

- Process that takes the most time to complete with the most steps

- Most expensive processes

- Processes that include manual work and many transitions between people
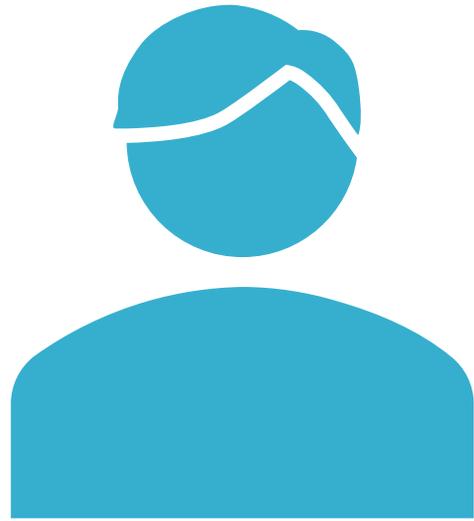
Persona Development Overview
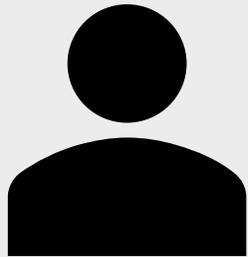
User Personas

A fictional profile that represents a group of users with similar service needs (also known as "client avatar")

- Memorable name, image, role

- Profile: Important background characteristics, attributes

- Motivation: Needs, wants, questions, goals

- Immediate Goals: Tasks, services, desired outcomes, pain points

Example Personas & Experiences

Lottery Players
- Playing at a machine
- Buying a lottery ticket

Unemployed Citizens
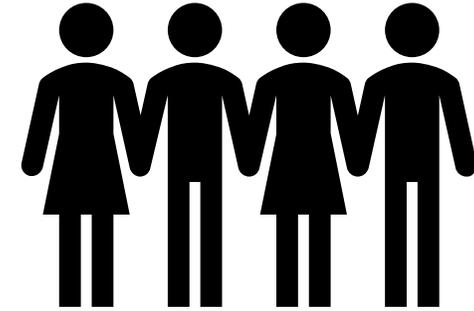- Receiving benefits
- Looking for resources

Veterans
- Healthcare benefits
- Home loan

Community Members
- Renewing driver's license
- Updating/changing address

Creating User Personas

Generate personas via:

- Interviews & focus groups

- Available data about your audience

- Combined experience of people who work with your audience and understand their needs

Do:
- Notice commonalities

- Create multiple personas

- Back up fictional personas

  with real data

Don't:

- Get too detailed or off topic

- Make assumptions

- Guess

User Persona Examples

Andrew
Oregon citizen needing to renew his driver's license

Profile			
Profile	Background	Important background details, personal characteristics, and attributes.	Current commercial driver's license expires today. A current CDL is a requirement for work. He had to take time off work to visit the office. Previous visits to the DMV had long wait times. Does have some criminal history on his record. Has his birth certificate and insurance information in hand.
	Values	What do they care about?	Renewing his CDL quickly so he may return to work.
Motivation	Goals	Generally, what are their goals?	Maintain an active CDL to be able to maintain his current position at work and ultimately providing for his family.
	Needs & Wants	Based upon their background and where they are in life, what might they need or want?	Want the process to go quickly and in a single visit. Want the documentation they brought to be accepted. Want the costs to be affordable. Want the renewal to take affect immediately. Their criminal history shouldn't affect their CDL status.
Immediate Goals	Tasks	As it relates to their immediate goals, what are the main tasks they may need to do?	Complete the appropriate paperwork and bring a copy of their birth certificate, current auto insurance information, and active CDL. Provide acceptable payment.
	Services	What are the key services they would interact with while pursuing their immediate goals?	Oregon DMV systems for license history which subsequently interacts with Dept of Justice CJIS information to review criminal history. Payment Card Processing center for payment with a debit card.
	Desired Outcomes	As a result of interacting with the service, what would they expect?	A renewed CDL on a single visit to the DMV.
	Pain Points	What are some pain points they are or could be experiencing while in pursuit of their goals?	Criminal history information is not accurate potentially delaying the renewal process. The birth certificate is not original making it unacceptable. The auto insurance policy isn't a complete number. The wait times at the DMV are several hours aggravating their mood and potentially closing the office before they can be served.

Person Development Overview

Journey Map Overview

What are journey maps?
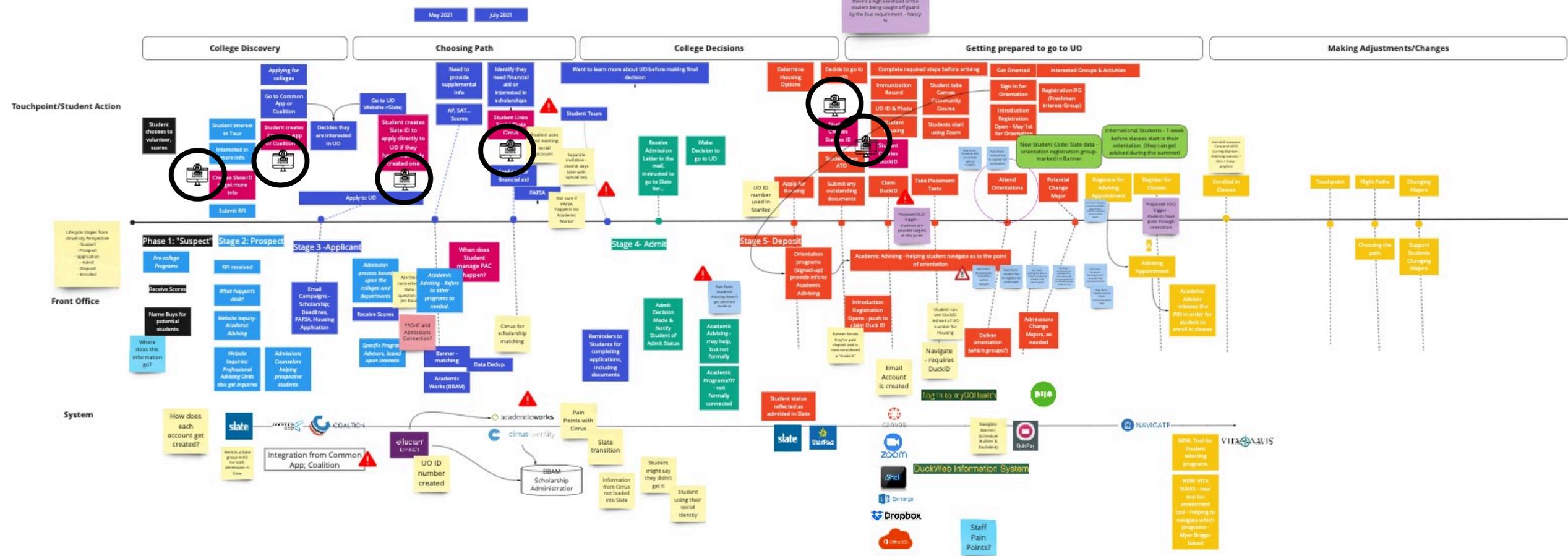
A visual representation that describes an experience from the persona's perspective.

- Stages

- Activities

- Interactions

Journey Map Overview

VISUAL SAMPLE ONLY!

Andrew

🎯 *Renewing his driver's license at an Oregon DMV office*

	Phase 1 Renewal notice via mail (2 month notice)	Phase 2 Deciding how to renew (online, in-person, or mail)	Phase 3 Make an appointment	Phase 4 Preparing for appointment	Phase 5 Attending appointment to renew license	Phase 6 Driver's license renewed
Journey Phase						
Actions/Tasks	• Read letter • Decide on forms of identification to bring to DMV • Decide if he will be an organ donor • Decide that he doesn't want an "real" ID • Decide when he needs to go into the DMV to schedule time off work	• Reviewing renewal options • Looking at calendar/work schedule • Looking up locations of local DMVs	• Decide to make an appointment to pre-plan with work schedule • Go to DMV website to select available date/time for appointment • Choosing which DMV office to visit • Completing the renewal pre-application	• Locate required ⭐ documents • Schedule time off work • Budget and reserve funds for DMV fees	• Drive to appointment • Documentation in hand • Find a parking spot • Go into the office and wait in line • Complete eye exam • Make a payment ⭐	• Wait for plastic renewed DL
Thought	*"Dang it! I have to renew my driver's license already?" "Oh no! Where's all my documentation?"*	*"I hope I don't get turned away at the DMV and have to go back."*	*"I have the appointment on the calendar and the first step is done."*	*"Where did I put my birth certificate?!"*	*"I hate waiting. I hope they don't turn me away when I get up the counter."*	*"I'm so happy I'm done with that for another 8 years now!"*
Tools & Services	• DMV renewal letter system trigger • DMV website • Transportation (drive, bus, etc.) • Payment options • Eye exam (contacts or glasses)	• Renewal letter • DMV website • Transportation options • Calendar • Computer/smartphone/ electronic map	• Current driver's license number • DMV website • DMV2U scheduling tool & pre-application	• Oregon Vital Records (birth cert) • Time & Attendance tool for work • Budgeting tools	• Reception/service desk • Contacts/glasses • Eye exam device/machine • Form of payment • Camera for picture • Printer for printing paper copy	• USPS Mail
Gain Points	• Opportunity to find/know where your birth certificate is • DMV renewal notice • Opportunity to update voter registration • Opportunity to update donor status • Multiple forms of payment accepted	• Choice in how to renew • Looking at calendar and opportunity to look ahead/plan • Looking up DMV locations, you know where you'll be going (won't go to the wrong place)	• Create a plan • Pre-application (less paperwork) • Decreased wait time because of an appointment	• Assurance that you have all the required docs/prepared • Now know where your birth certificate is!	• An expedited line/potentially less wait time • Opportunity for a new picture/replace older one you didn't like • Opportunity to learn new things/new services	• Renewed DL • Dont have to do it again for another 8 years • Updated voter registration • Updated picture
Pain Points	• Potential long wait time • DMV only open during work hours/taking time off work • May have to take a new picture	• Having to fit an appointment into a busy schedule • Preferred renewal method may not be an option	• Website not completely intuitive • CAPTCHA • Available appointment/DMV office options may not be ideal	• May have to order certified birth certificate • Having to revise budget to account for DMV fees • Managing work schedule & time off	• Still have to wait • Full parking lot	• Paper copy - not always accepted • Have to wait for plastic copy to come in the mail
Emotions	😠 **Annoyed, stressed, concerned about long wait times**	😰 **Anxious**	🥳 **Security, small amount of relief, accomplishment**	🤔 **Frustrated, rushed**	😒 **Bothered, impatient, apprehensive, hypervigilant**	😃 **Relief, satisfaction**
Emotional Progression						

Journey Map Overview

EXAMPLE JOURNEY MAPS

Customer Journey Map

Stages	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Customer Experience					
Touchpoints	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here
Thinking & Feelings	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here
Recommendations					
Ideas For Improvements	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here	• This is a sample text, • add your own text and description here

Journey Map Overview

EXAMPLE JOURNEY MAPS

Customer Journey Map

Customer Journey Map

Stages	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Steps	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here
Feelings					
Opportunities	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here	This is a sample text, add your own text and description here

Journey Map Overview

Information Gathering Methods

- Interviews or focus groups
- Discovery sessions with users
- Observation
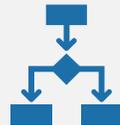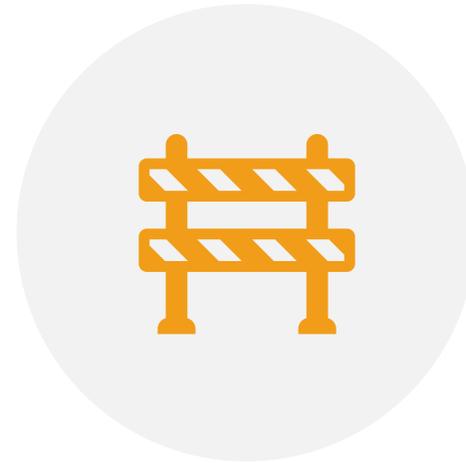- Review of existing information: reports, surveys, data, etc.

Journey Map Exercise

Let's build our journey map on a
[Miro board](#)

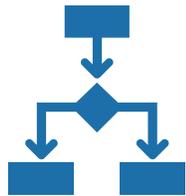# Analyze the Journey Map for Improvement Opportunities

LOOK AT YOUR JOURNEY MAP THROUGH EACH OF YOUR PERSONA'S LENSES OR LISTEN TO MULTIPLE PEOPLE'S EXPERIENCES THROUGH INTERVIEWS OR FOCUS GROUPS

CONSIDER BARRIERS TO REACHING THE NEXT STAGE/STEP IN THE PROCESS
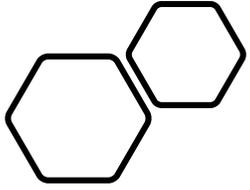
Journey Map Overview

Implement Improvement Opportunities

This approach is most successful when the decision-makers have a strong commitment to change

Any implementation strategies chosen should have a point-person in charge of seeing that change through

Recommendations for improvements need to be tangible, actionable, and clear

Keep Going!

- Keep track of additional experiences you could journey map

- Start a journey map for an experience in your area of work

- Share journey mapping resources with your team or colleagues

- Engage in continuous improvement strategies
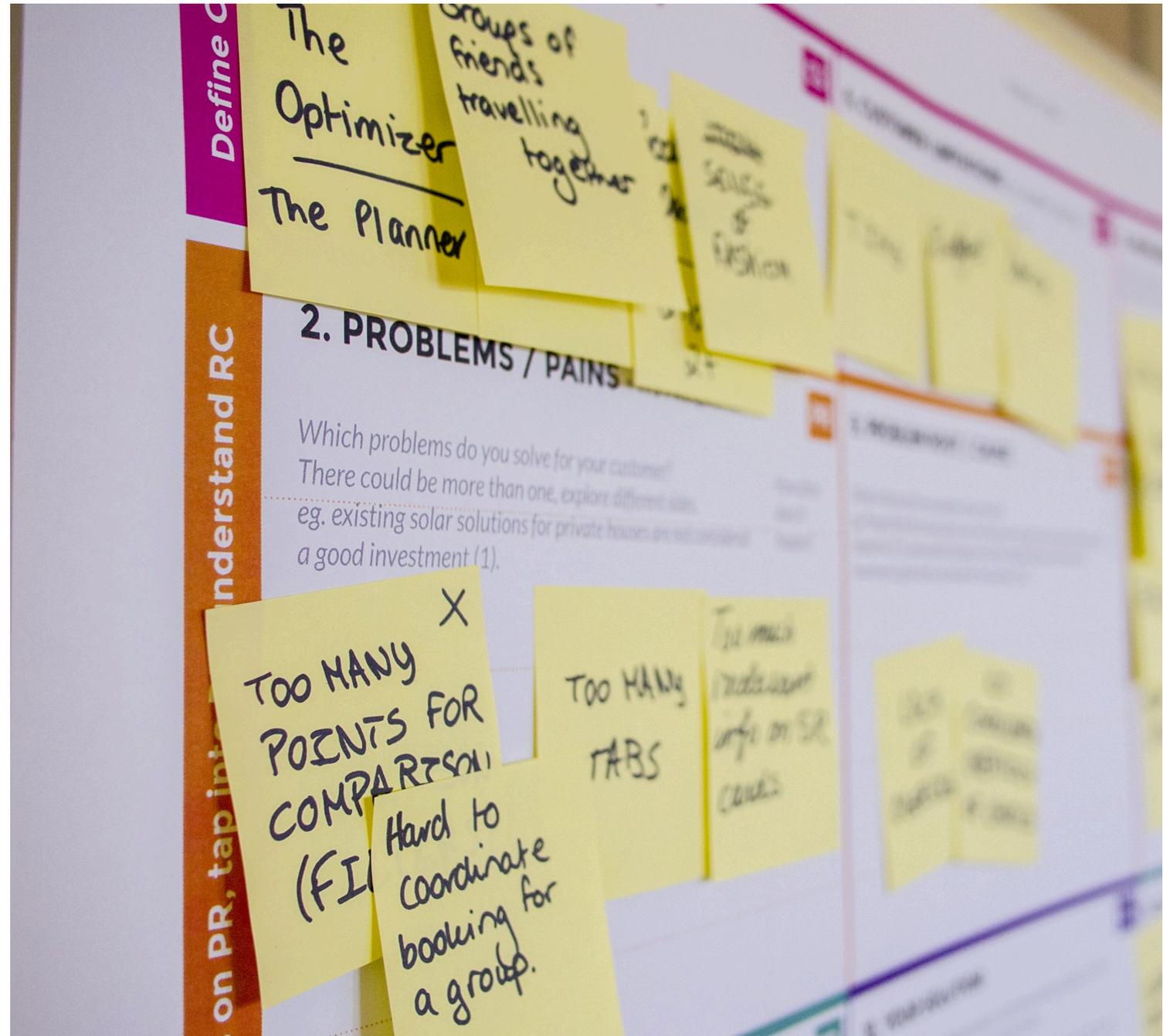
Q&A

Resources

- **Using Customer Journey Maps to Improve Customer Experience** (Harvard Business Review)

- **Customer Journey Map: What is Customer Journey Mapping & Why is it Imporant?** (Salesforce)

- **Customer Journey Maps** (Interaction Design Foundation)

- **Miro** (Tool & Templates)