

Section 6

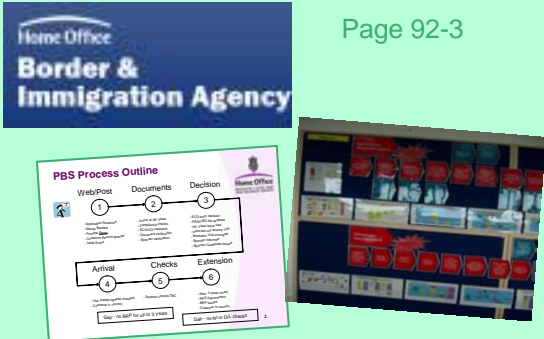
Case studies



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



The image shows the Home Office Border & Immigration Agency logo and a 'PBS Process Outline' flowchart. The flowchart is divided into two main sections: 'WebPost' and 'Arrival'. 'WebPost' includes steps for 'Documents' and 'Decision'. 'Arrival' includes steps for 'Checks' and 'Extension'. A photograph of a service counter is also visible.

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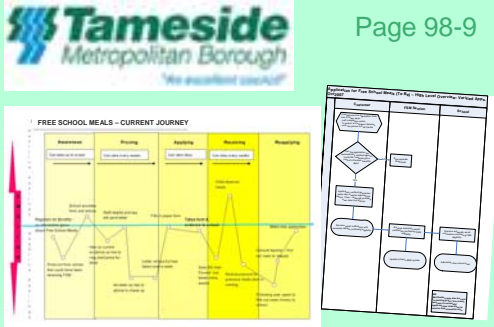
The image features the HM Revenue & Customs logo and two comic strips. The comic strips use a cartoon format to illustrate a customer journey, with characters and speech bubbles.

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The image displays the Eurostar logo, a photograph of a train, and a 'EUROSTAR JOURNEYMAP' line graph. The graph plots various stages of the journey: 'Boarding', 'Check-in/boarding', 'Set off', 'Lével tunnel', 'Crossing', 'Enter tunnel', and 'Disembark'. A note at the end says 'Wow - it's like heart of the city!'.

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The image shows the Tameside Metropolitan Borough logo, a 'FREE SCHOOL MEALS - CURRENT JOURNEY' chart, and a flowchart. The chart is a line graph with a yellow background, showing the current journey through various stages. The flowchart is a standard process flow diagram.



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

Case Studies



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.



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.





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.

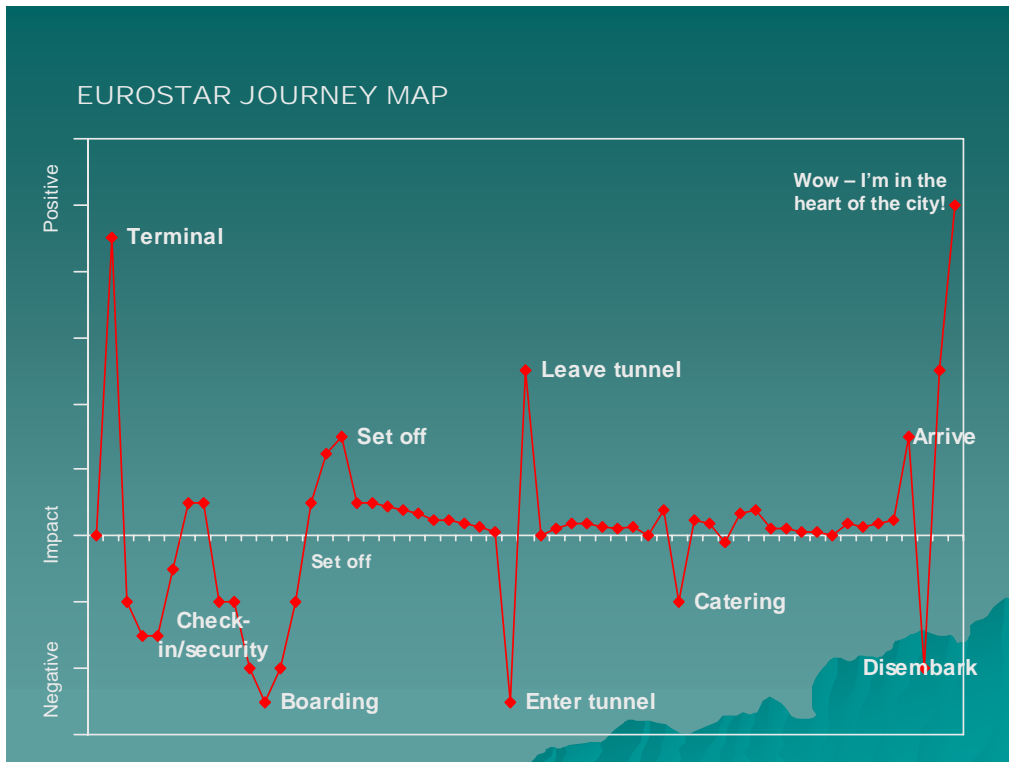


APPROACH

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 Studies



CASE STUDY: TAMESIDE FREE SCHOOL MEALS

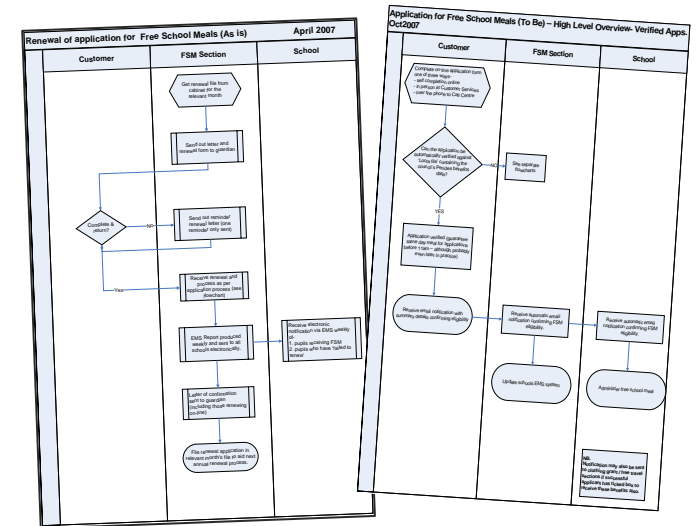
BACKGROUND AND OBJECTIVES

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.

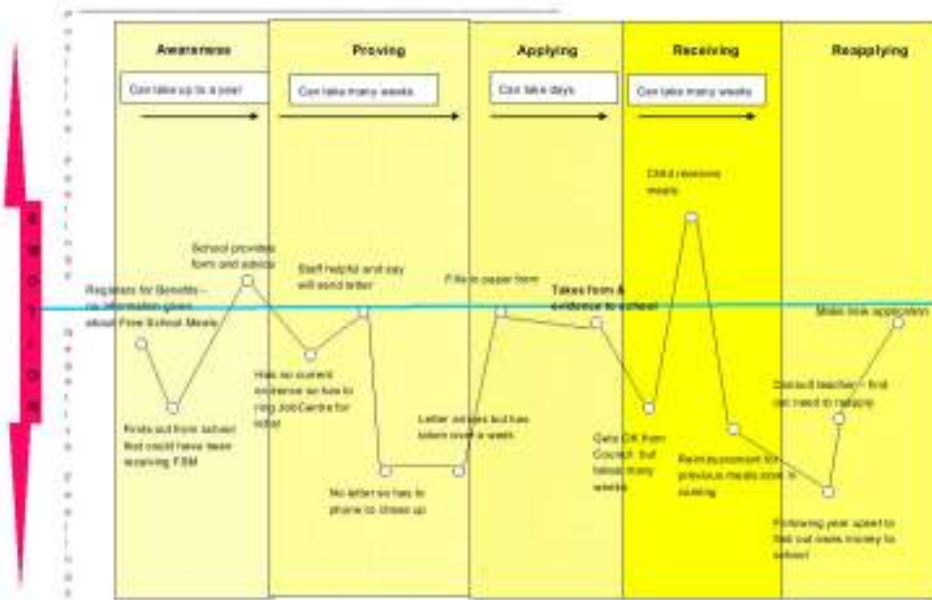


System maps were produced for current and 'ideal' experience

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.

Case Studies