

Section 4

Mapping the System

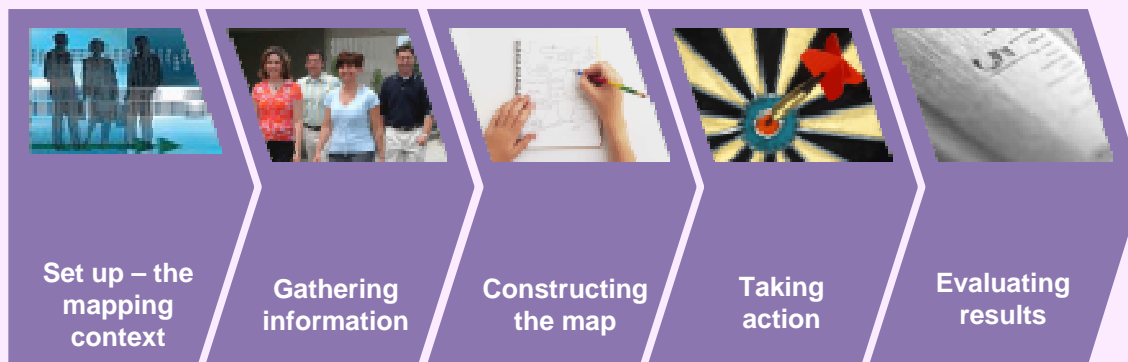


INTRODUCTION

Also known as process mapping, mapping the system is about creating a graphic representation of all the steps, actions, interactions and decision points of a process in order to understand it and thus identify opportunities for improvement.

In this section we describe how to map a system, combining deep understanding of the customer experience with the practicalities of the system or process they encounter, and moving through to taking action and evaluating results.

There are five steps in the process:



'Mapping the System' is great for:

- Sharing what the current process looks like
- Showing relationships between steps and other departments involved
- Identifying deviations from the norm – where do things go wrong?
- Identifying duplication and other inefficiencies
- Identifying how and where things can be improved (and where further investigation is needed)
- Comparing the view of staff with the view of customers – you can do two maps and look at the differences between them
- Training – showing how things should be done
- Serving as process documentation and setting standards

Your first draft of a system map may well be made using internal staff rather than customers. This can then be compared with a map drawn up with the help of customers to identify the gap between your assumptions and their experiences.

Mapping the System

This section describes the second mapping approach and sets out steps and tools to help.



Core tools are included in this guide but there are more in the online toolbox.

THE SYSTEM MAP



Take care that you start by mapping the system as it really is, not as you'd like it to be.

Mapping the System

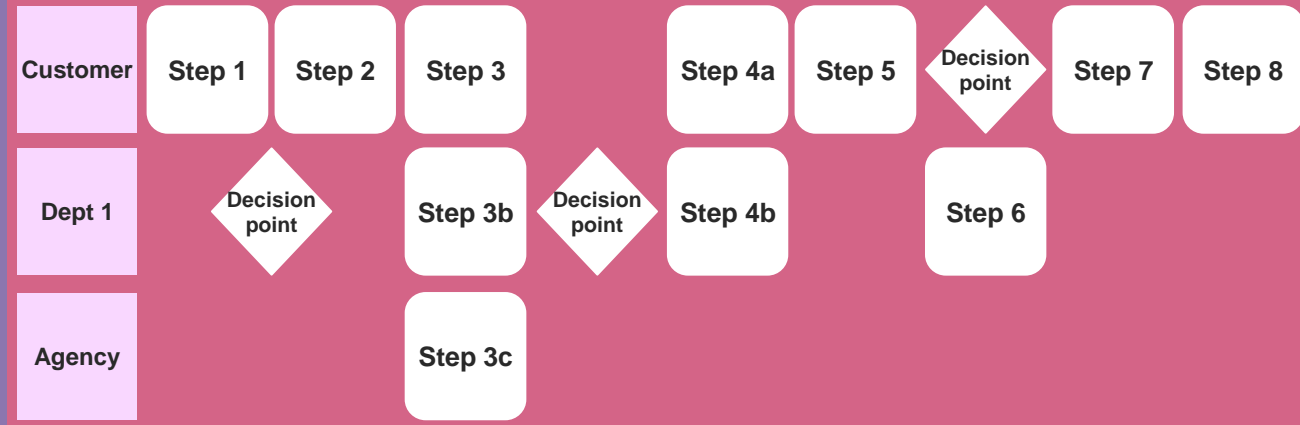
The basic tool for Mapping the System is shown here. As you read through this section, we'll take you through how to build your own map. First, however, we need to cover the set-up phase where you will consider the context in which you will be mapping.



CONTENT CHECKLIST

Objectives/ scope		End-to-end system definition		Customer segment	
Core system goals	Goal 1:	Goal 2:	Goal 3:		

KEY STEPS IN SYSTEM/CUSTOMER JOURNEY



NOTES ON PROCESS AND CRITICAL INCIDENTS

		Critical incident			Critical incident			

SET UP: THE CONTEXT

As with any journey mapping, as a first step you need to clarify the context. This tool differs slightly from the one given in Section 3, to reflect the different type of mapping that you are doing.



CONTEXT CHECKLIST



Who will use the maps?

- Identify key users, current expertise and knowledge or use of system/process maps
- Agree how these key users will be involved in the process
- Identify additional stakeholders and agree how they should be involved/informed
- Ensure everyone is clear and aligned in their expectations of the process and outputs



How will maps be applied?

- Confirm what the maps will be used for and the level of detail/robustness required
- Be clear whether you need to quantify the steps in the map in terms of, for example, costs incurred or time taken
- Ensure you have set clear, measurable objectives
- Are you also mapping the customer experience? If so, how will you consider the two maps together?



What is the scope?

- Confirm the budget and timescales
- Agree how and when other departments and agencies should be involved
- Audit your knowledge of the system – how much do you know already?
- Make an initial plan of the approach, process and anticipated outputs



Mapping the System

At the start of mapping, you need to be clear about three things that set the mapping context - the who, how and what.

SET UP: INITIAL ISSUES TO CONSIDER

In the set up phase you need to put together an initial definition of the system you're mapping and the customer group or groups you need to focus on. You also need to think about who else might be involved.



What's the system/process?:

- Clearly identify the end-to-end system or process you are mapping, taking particular care to define clear start and end points based on both the internal view and also the external customer one
- Think about whether you are building on an existing system or whether you need to develop a new one from scratch. If it's a new system you **have** to walk people through the process – don't make assumptions about how they behave
- Try to avoid over complexity. Large systems can be broken down into component parts and reassembled later



Which customers?

- For system mapping you don't usually need to segment and identify different customer groups unless they have a genuinely different **experience** of the system, as opposed to **response** to it.
- However, if you do need to segment customers, see page 25 in Section 3 for notes on segmentation and where to find out more about it



Which other departments?

- Identify all intermediaries, departments, agencies etc. involved and ensure you have the ability to get input from all of them in building your map
- Pay particular attention to 'baton-change' points where departments interact
- Think broadly and think from the point of view of the customer. Customers don't necessarily recognise departmental boundaries and may consider contacts and communications from other areas of government to be part of the process you're mapping
- Recognise the impact of:
 - Both local and national government
 - All 'government' communications from letters to websites
 - NGOs such as Citizens' Advice Bureaux or charities like Age Concern

Mapping the System

Precise definitions of the system and the customer may change after customer input, but you need to be clear at this stage about the parameters within which you should be working

SET OUT THE MAP(S) YOU WANT TO COMPLETE

CONTENT CHECKLIST

Objectives/scope: End to end system definition: Customer segment:

Core system goals: Goal 1: Goal 2: Goal 3:

KEY STEPS IN SYSTEM/CUSTOMER JOURNEY

Step 1 Step 2 Step 3 xxx Step 4a Step 5 Customer journey Step 7 Step 8

xxx Decision point Step 3b Decision point Step 4b Step 6

xxx Step 3c

NOTES ON PROCESS AND CRITICAL INCIDENTS

xxx xxx xxx xxx xxx xxx xxx xxx xxx

Having defined your context, you can fill in the headers on your system map or maps:

- Objectives/scope
- End to end system definition
- Customer segment
- Core system goals.

Make sure you map it as it is in reality, not in theory.



MAP COMPLETION CHECKLIST

Objectives/scope	<ul style="list-style-type: none"> ■ State overall objectives of the mapping exercise <input type="checkbox"/> ■ How and by whom will the maps be used? <input type="checkbox"/>
End to end system definition	<ul style="list-style-type: none"> ■ Clear statement of what you're mapping, with start and end points <input type="checkbox"/> ■ Is this an existing system or a new one? <input type="checkbox"/>
Customer Segment	<ul style="list-style-type: none"> ■ All customers or a specific segment? <input type="checkbox"/> ■ Include brief description <input type="checkbox"/>
Core System goals	<ul style="list-style-type: none"> ■ What are the specific things you want to achieve? <input type="checkbox"/> ■ Have you set clear, meaningful criteria for success? <input type="checkbox"/>
How many maps?	<ul style="list-style-type: none"> ■ Are you mapping one system or more? <input type="checkbox"/> ■ Are you mapping the current experience and/or the ideal one? <input type="checkbox"/> ■ Will you be comparing the view of staff with the view of customers? <input type="checkbox"/>

Mapping the System

Once you have set out your maps, the next step will be to pull together the information and inputs that you need in order to complete the rest of the maps.

GREAT EXAMPLES OF MAPPING THE SYSTEM

These are great examples of where good up-front planning resulted in successful outcomes from system mapping.



ROYAL BOROUGH OF KENSINGTON AND CHELSEA



In a drive to build customer focus, the Royal Borough of Kensington and Chelsea undertook initial customer segmentation work, and are now in the process of realigning their services and IT, based on a better understanding of who their customers are, what they need and which are their preferred access channels.

Consultation and a predictive understanding of customers, based on segmentation, revealed customer dissatisfaction about parking services (to renew parking permits, the system required people to come to a parking shop in person, during working hours). RBKC started work on a project to allow on-line permit renewals, and co-located their residents' permits team with other services in a new customer service centre, with an aim to develop multi-skilled residents teams. This has allowed better use of information and increased resolution at the first point of contact.



BORDERS & IMMIGRATION



When the Borders & Immigration Agency carried out system mapping to help manage immigration, they worked alongside an Implementation Manager from day one. Together he and the mapping team were thinking about possible actions and implications right from the start.

The implementation manager was kept in the loop at the pre-research stage and was directly involved as soon as findings became available.

The benefits of his involvement became clear when it came to action planning. He helped engage staff, identify competencies needed and develop training programmes, all of which contributed to the successful introduction of new processes and service standards.

GATHERING INFORMATION

Before you start the actual process of mapping, you need to be sure you have the information you need. Follow your own system, talk to colleagues and other departments. Above all, make sure you reflect **the customer**. Ensure you know about all the following:

Activities:

- What are the key tasks and steps?
- What generates them? Why?
- Who's responsible?
- What's the order of events?
- Are there options – different journeys?
- Who performs each step? How?
- Which channels?

Inputs:

- What data inputs are there?
- What step(s) do they link to?
- What forms or reports are used?
- What computer systems are involved?

Outputs:

- What are the outputs from the process?
- How many are there?
- Where do they go?
- How are they used?
- Who reviews them and when?
- What level of detail is needed?

Metrics:

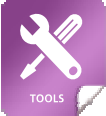
- How long does each step take?
- What are the costs? (to you and to the customer)
- What volumes are dealt with? (how many people, forms, etc.)
- How do time taken and cost incurred vary by journey?

Issues:





- Are there different entry or exit points?
- What problems arise (nature and frequency)?
- What causes them?
- How are problems and errors handled?
- Are short-cuts taken? How?
- Are there peak periods of demand?

As you gather your information be sure to record and document what you do, taking care to clearly identify all sources

Mapping the System



SOME TECHNIQUES FOR INFORMATION GATHERING

<div style="background-color: #e91e63; color: white; padding: 5px; text-align: center; font-weight: bold;">Walk the walk</div>  <p>Take time to walk personally through the entire system/customer journey step by step.</p> <p>Make detailed notes focusing on time taken, duplication, points of high and low efficiency. Compare thoughts with colleagues.</p>	<div style="background-color: #e91e63; color: white; padding: 5px; text-align: center; font-weight: bold;">Buddy up</div>  <p>Accompany a customer and front-line staff member going through the same process or system. Experience things exactly as they do. Note down the steps taken and level of satisfaction from both perspectives to compare internal and external experiences.</p>
<div style="background-color: #e91e63; color: white; padding: 5px; text-align: center; font-weight: bold;">Daily dissection</div>  <p>Get customers and front-line staff to complete detailed diaries as they go through the whole system. Keep close to them and give prompts/reminders to ensure no steps are missed.</p> <p>Compare the experience from both angles.</p>	<div style="background-color: #e91e63; color: white; padding: 5px; text-align: center; font-weight: bold;">Steal with pride</div>  <p>Identify agencies/companies/service providers who have systems similar to yours (both public and private sector).</p> <p>What do they do differently? Which parts of the system are better/worse? What can you learn and use in your own system?</p>

When you map a system, you don't need the depth of emotional detail used in mapping the customer experience, but you still need to approach this from the viewpoint of the customer. See Section 3, page 27 - "Walking in the Customer's Shoes" for ideas about how to get close to customers.



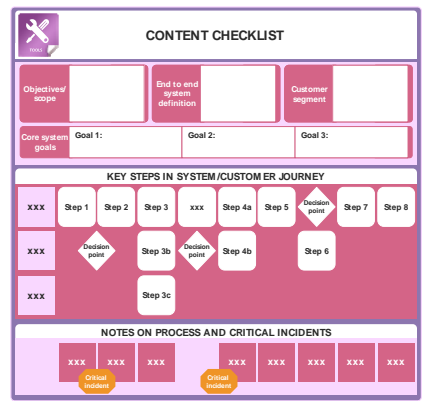
In many cases you'll want to think about both the current experience and the ideal journey. This section explains how to build maps for both

Mapping the System

Completing the map is key, but the map isn't an end in itself. When planning, always allow plenty of time after you've done the mapping, to think about taking action and tracking results.

CONSTRUCTING THE MAP: INTRODUCTION

Having set out your maps and gathered information, it's time to fill out the remaining sections of each map and undertaking an initial analysis of it. The following slides describe how to do this. This will usually be done in a mapping workshop, but not always, so we've set out the steps to be taken and then, on pages 71-2, described some workshop approaches



You should have filled in the top boxes of the map in the set-up stage. In this stage we'll cover how to fill in all the remainder of the map.




- Map the process as it actually happens
- Think about it across the whole of government
- Talk to lots of people who are involved - customers, staff, other departments
- In particular, involve frontline people
- Keep probing and asking questions
- Try to map at a fairly high level, at least initially




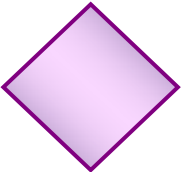
- Don't attempt to start mapping until you've gone through the set-up properly
- Don't map what you think might happen – be honest and objective
- Don't struggle on your own – use a wider team!
- Avoid getting bogged down in detail. If a system is really complex, try breaking it down into manageable chunks

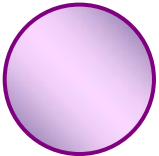
SYMBOLS USED IN MAPPING THE SYSTEM

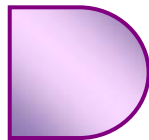
A large number of symbols can be used to create system or process maps. The key ones that are used fairly universally are shown here:

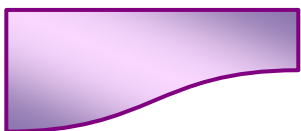
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Terminator
The start/stop point in a process.
- 

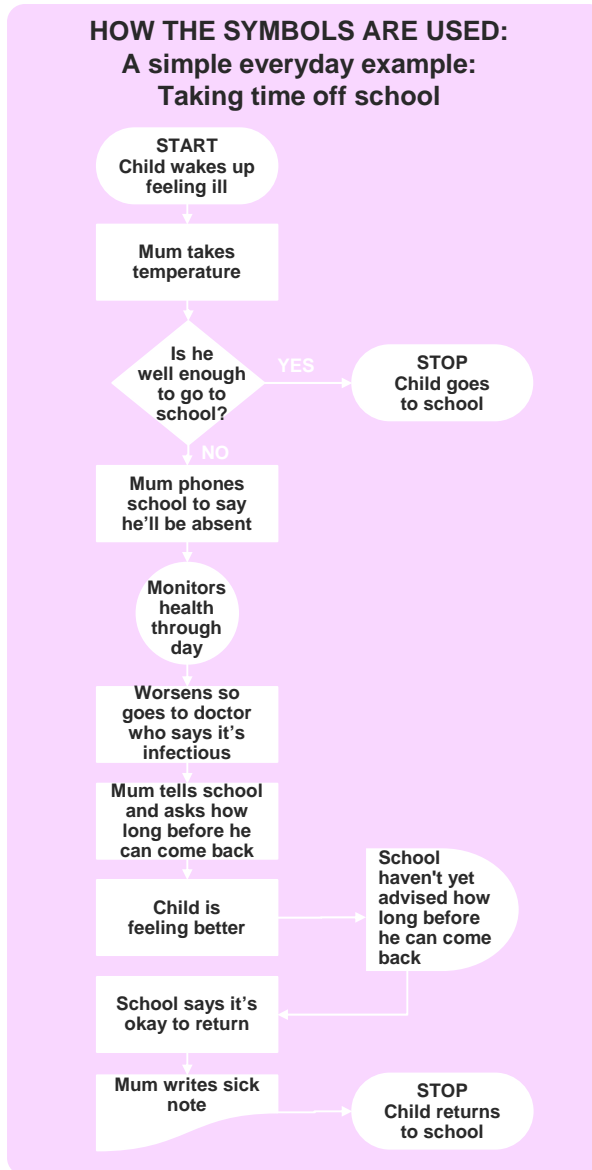
Process
Process or action step - the most common symbol.
- 

Decision
Question or decision point, shown with alternative routes coming out of it.
- 

Connector
An inspection point in the process flow.
- 

Delay
Caused by a need for action by a party not doing the process.
- 

Document



There's nothing wrong with adding to these basic symbols. However, be sure always to include a key so that anyone reviewing the map knows what it all means.



Mapping the System


More mapping symbols can be found in the online toolbox.

HOW TO CONSTRUCT A MAP



CONSTRUCTING YOUR MAP: KEY STEPS



Step 1: Identify journey steps

- Choose the level of detail you want to write at; either detail every simple action, or just map enough information to understand the general process
- Identify key steps that occur in the system. Include both what the customer experiences and relevant back office functions. Write them on post-it notes for easier sequencing
- At this stage, focus on events, not decision points
- List steps clearly and succinctly. Use enough words to say what happens, but don't write an essay
- Be very clear on start and end points, and where people enter and leave the system. Distinguish between completed journeys and early 'dropouts'



Step 2: Sequence them and identify decision points

- Put the steps in chronological order – after each one, ask 'What happens next?'. Work on a wall or large roll of paper. If you used Post-it notes, it's easy to move these around until you're sure you've got it right
- Don't draw arrows at this stage – you'll do that later
- When you're happy you have the right order of events, think about the symbols to use for each step (see previous page)
- Specifically, identify and add in decision points
- Include a key for any symbols you use, especially new or unusual ones



Step 3: Identify who's involved and dependencies

- Working downwards on your wall or roll of paper, list out all the parties involved in the process or system, starting with the customer and your own department and moving on to other departments, agencies, NGOs etc.
- Identify which are involved at each step in the process and move your Post-it notes up and down so they appear in line with the appropriate party
- Identify dependencies (see page 66). Once this is done you can add arrows to your map to indicate the flow. Working in pencil to start with helps!



Step 4: Add notes and identify critical incidents

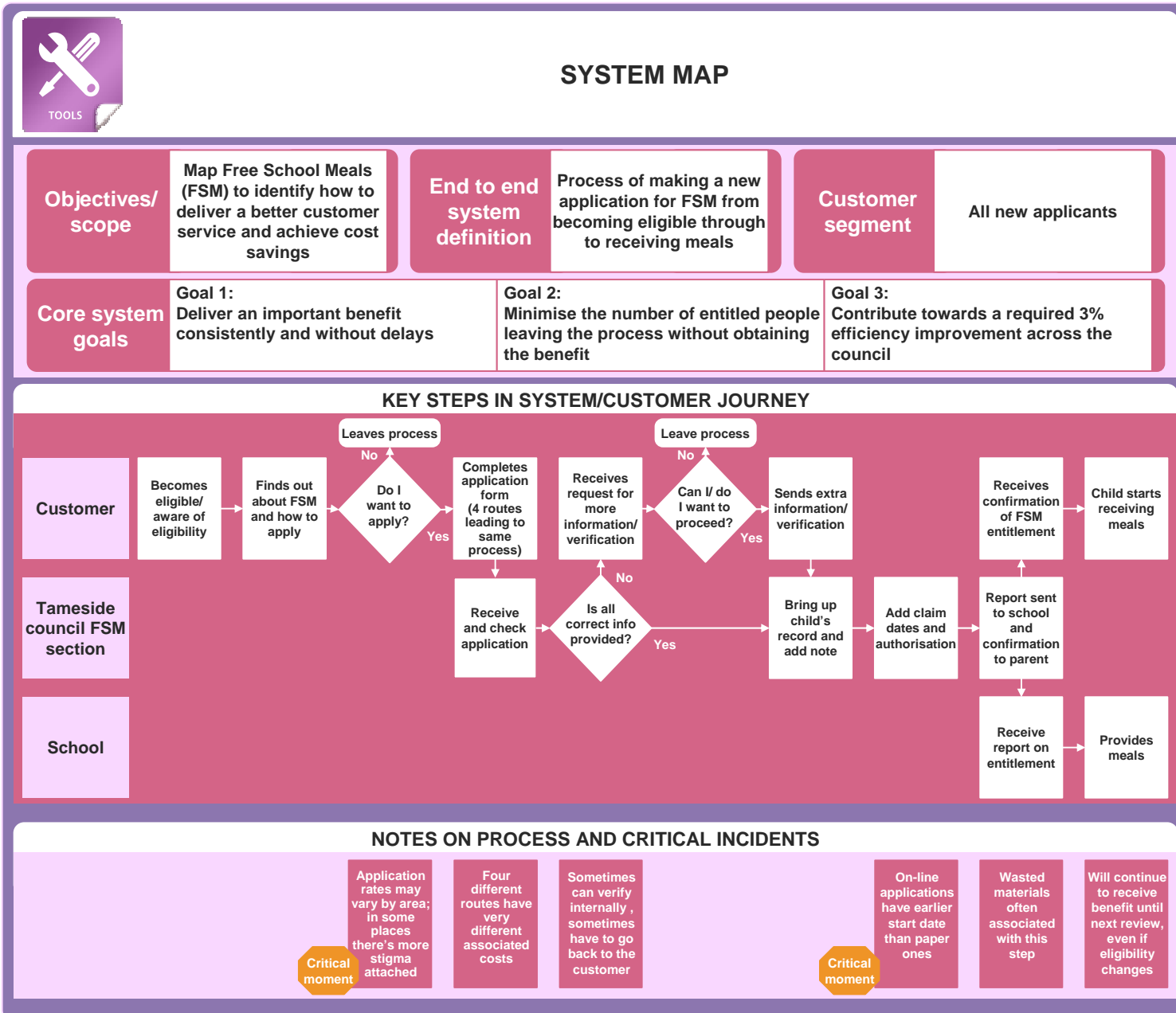
- Final step is to annotate the map with notes – what's going on and why?
- You need to identify where problems and opportunities could arise (see page 67 and the checklists on pages 68 and 69)
- Highlight critical incidents – the points in the process that are real 'make or break' moments
- You may also at this stage want to build the 'ideal' map and carry out a gap analysis – looking at the difference between current experience and the ideal (see page 70)

Mapping the System

This page shows the steps you need to go through to construct a system map like the example shown opposite.

The following page gives hints to help you in the process.

THE SYSTEM MAP: FREE SCHOOL MEALS EXAMPLE

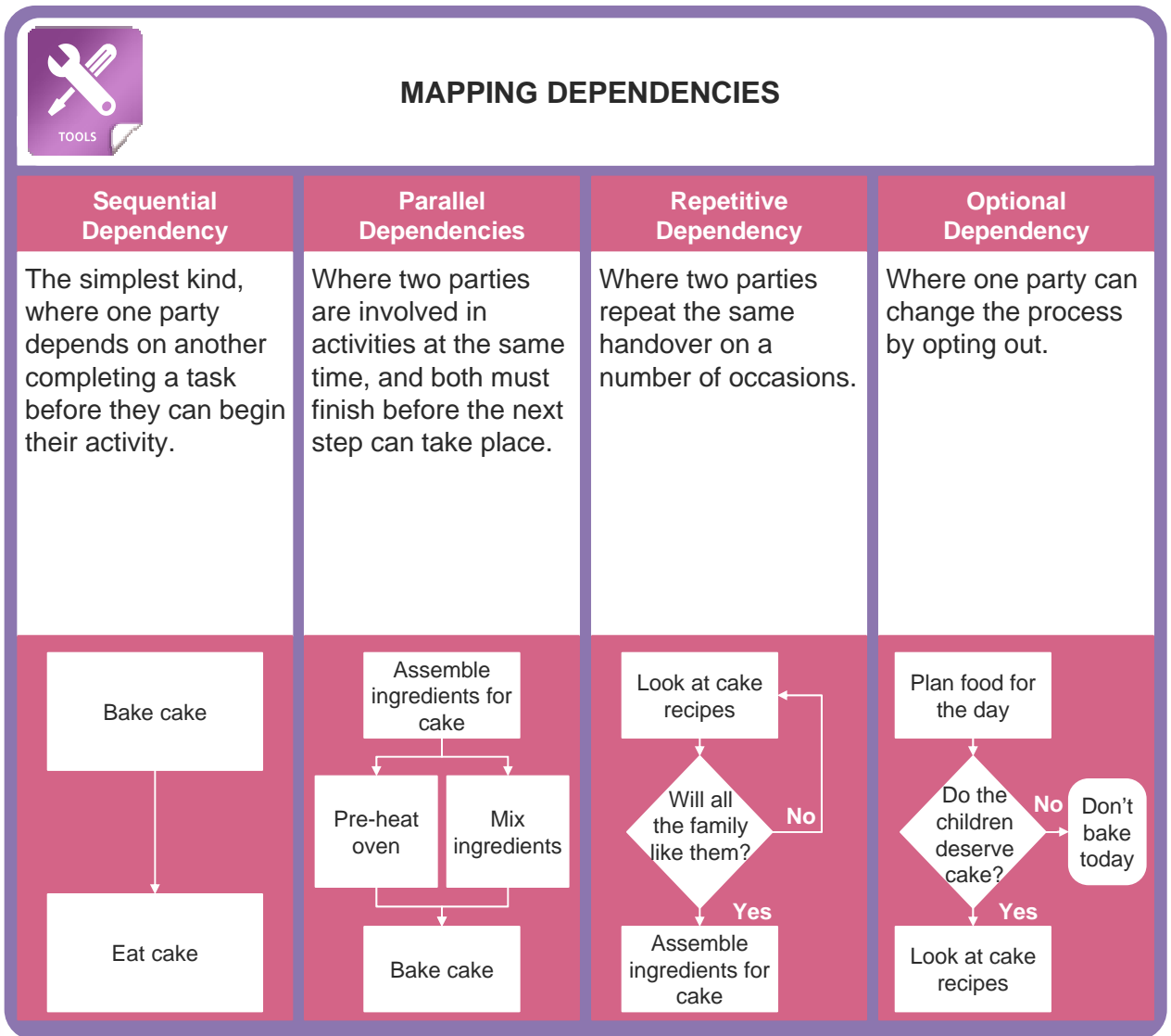


Mapping the System

The worked up example of a system map is based on the work done in Tameside to review the process for applying for free school meals. This map, re-formatted slightly to fit the standard tool used in this guide, reflects the process as it stood when the mapping was first done.

IDENTIFYING AND SEQUENCING STEPS

The tool here shows various types of dependency that are generally used in mapping, and how and when to use them.



Mapping the System

A 'dependency' refers to the relationship between two actions in a process, where one can't happen until the other is completed. You'll need to be able to identify and express these on a map, but don't feel too constrained by mapping rules. Express dependencies in any way that suits your process - just make sure you use notes or a key to show what you have done.

IDENTIFYING PROBLEMS AND OPPORTUNITIES

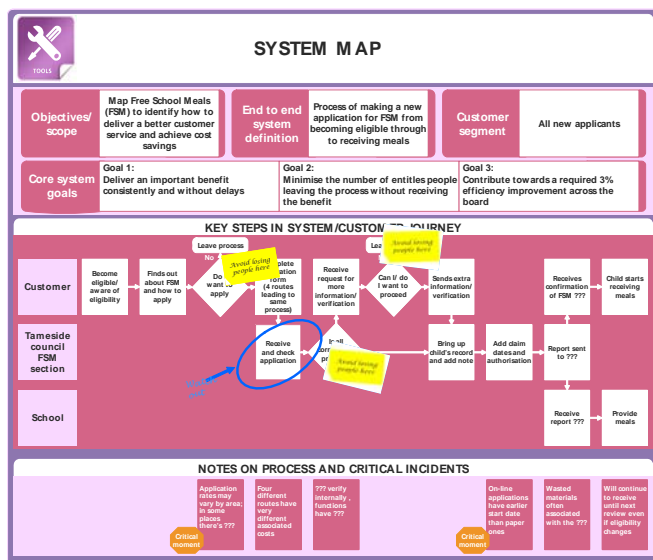
Once you've produced your map of the current system, it's often useful to think about and identify problems and issues before drawing up the 'ideal' system. Use the checklists on the following pages to help with this.



WORK WITH YOUR MAP TO IDENTIFY PROBLEM AREAS

- Work with a big copy – it helps to have space to write!
- Using the checklist on the following pages, highlight problem areas using highlighter or marker pens. You can use colour-coding to signify different types of problem, or use Post-its to add notes to your map
- Pay particular attention to what happens at decision points and critical incidents
- Use the notes you've already made, but think beyond these. Look at your process from different perspectives – your department's, other departments' and, vitally, the customer's

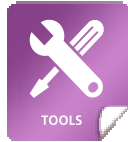
Mapping the System



Here's the example map from page 65, marked up to identify problem areas. Use whatever method of marking you prefer, but it helps to work on the map itself so you identify exactly where the issue lies.

This is the first stage of problem identification, which you can do after drafting your map of the current process. You'll come back to this again in the 'Taking Action' section of the guide.

IDENTIFYING PROBLEMS AND OPPORTUNITIES



CHECKLIST 1: THE CUSTOMER EXPERIENCE



Complexity

- Is the route through the system clear to customers? Are there points where they're unsure where to go next?
- Are they having to do the same thing more than once?
- Are they clear where responsibility lies at each step in the process?
- Are badly-designed forms or other materials causing delays?



Time taken

- How long does the whole process take now?
- How long does each step take?
- Are people satisfied with the overall timespan and with time taken for individual steps?
- Where do delays occur and why?



Accessibility

- Where and when are people coming into this system? Are they coming in at the right points?
- Once in the system, is signposting clear?
- Does the customer see consistent branding?
- Are you offering appropriate channels?



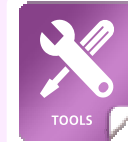
Nature of experience

- What's pleasant/unpleasant about the experience now (customer experience mapping can help here if you don't know)
- What are the real turn-off points?
- Where are you losing people?



Cost

- What's the cost to the customer at each step in the process?
- At which steps are costs seen to be unacceptable?
- Is the cost the same for all? If not, who experiences most problems?



CHECKLIST 2: EFFICIENCY AND EFFECTIVENESS



Time taken

- Is the overall timeframe acceptable?
- How long does each step take now?
- Where are the bottlenecks?
- What caused delays? Why?



Duplication

- Are any steps repeated? Why?
- Does data get entered more than once?
- Does work get double-checked? Why is this necessary?
- Do paper records duplicate electronic ones?



Complexity

- Is there a clear reason why each step is there?
- Does it fulfill a unique purpose?
- Are there 'dog-legs' in the system that need to be ironed out?



Errors

- Where do errors commonly occur?
- Where is rework taking place because of errors?
- Who's making errors and why?



Responsibilities

- Are responsibilities clear at each step?
- At decision points is there a single, clearly-identified decision-maker?
- Who captures and owns data?
- Are 'baton-change' points between departments clearly identified and smooth-running?



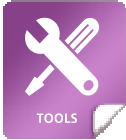
People

- Are there bottlenecks/errors/delays as a result of too few skilled people?
- Where are people (our own or partners') failing to deliver fully, and why?

Mapping the System

*The different checklists are here to help you think about problems from different angles, but they are **not** mutually exclusive. Achieving better efficiency, for example, can often go hand in hand with improving the customer experience.*

IDENTIFYING PROBLEMS AND OPPORTUNITIES



CHECKLIST 3: COST TO SERVE



Overt costs

- What's the direct cost to government at each step in the process?
- Where are costs particularly high?
- Are some channels especially expensive?
- Are there avoidable contacts?
- Are some customers particularly costly?



Hidden costs

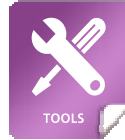
- Where might there be hidden costs associated, for example, with reworking, partner costs or costs not directly incurred by your department?



Impact of costs

- Where are high costs adversely affecting the level of service delivered to the customer?
- Where are you incurring cost that's failing to deliver any value to customers?

The 'Tell us Once' initiative is seeking to join up government services across departments, not by tacking together diverse systems but by looking for a solution that starts from the viewpoint of the customer.



CHECKLIST 4: CHALLENGING THINKING



Assumptions

- Are you making assumptions about the way things should be done based on what's always gone before?
- Are steps really adding value?
- Are decision-points really necessary?



Inertia

- What parts of the system have been around for a long time without review or overhaul?
- Where have steps proliferated because something's been tacked on to an old system rather than rethinking the whole thing?



Perspective

- Where are the touchpoints with other government systems or processes? Have you reflected all of these?
- Do you understand the impact on the customer?



Choices

- Are there points where you're delivering the same service to everyone, although not everyone needs the full process?
- Do you know what the cost/benefit balance is for different customer types?



Relevance

- Are parts of the system becoming out-of-date?
- What do your customers think?
- Are there points where the process has failed to take advantage of new technology (e.g. IT)?

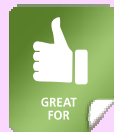


Mapping the System

BUILDING THE 'IDEAL' MAP AND DOING A GAP ANALYSIS

There are two possible approaches to mapping the ideal process. Where you are dealing with relatively small, clearly defined issues in single systems, it's often enough to rework your current map. However, for bigger issues and especially ones that cut across departmental boundaries it is often better to start from scratch.

Use your current map as a starting point and edit it to remove unnecessary steps or make changes to the flow



- ✓ Systems or processes that have small, clearly-identified problems
- ✓ Quick fixes when working within a tight deadline

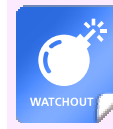


- Avoid replicating existing practices simply because they're there; challenge to ensure you're not missing something better
- Ensure you're **preventing** problems not just fixing those that exist

Start from scratch, following the same approach that you used when constructing the current map (page 64)



- ✓ Thinking fundamentally about the process with no preconceptions
- ✓ Designing entirely new systems to replace, rather than update, old ones
- ✓ Re-designing systems that cut across more than one department



- Allow enough time to do this properly – don't short-change this step just because you've done this once already
- Keep challenging. If you're starting from scratch use the chance to question all assumptions, but...
- ...be realistic. You still need to take account of constraints that can't be overcome

When you've completed the 'ideal' map, you can look at how it differs from the current process or system by doing a gap analysis. This can help highlight the benefits of changing the system and can be a valuable input to any business case.



CARRYING OUT A GAP ANALYSIS

- List out the key differences between the maps, identifying steps that need to be reviewed, processes that need to be changed, and differences in the list of departments/agencies involved
- Identify changes to key metrics (this will help make the case for change). Look at number of steps, number of inputs to the system, time taken to follow it through, number of customer contact points and costs to government and to the customer
- Record any issues arising. You can follow up on these further at the 'Taking Action' stage



Mapping the System

After completing your current map and identifying problems with the existing system, it's usually helpful to think about what the 'ideal' process would look like. You can then compare the two maps and identify differences between them - a process known as 'gap analysis'.

THE MAPPING WORKSHOP



PREPARATION



Who?

- Frontline staff
- Experts on the process
- People with detailed, first hand knowledge
- Structured, logical thinkers

How many?

- If you're only mapping one process, about 4-6 people is ideal
- If you are mapping more and need to break into groups 6-10 would be good

Where?

- Logistics are important – lots of wallspace and room to move around
- You could choose an offsite location and/or one relevant to the journey you are mapping, but this isn't essential



See online toolbox for workshop planning checklists

RUNNING



What to bring

- Evidence gathered during set up and planning
- Descriptions of customers
- Any existing measures/metrics (satisfaction, time taken, costs)
- Materials to make mapping visual and clear – different coloured Post-its, coloured pens, rolls of paper

How to run?

- Plan an agenda that's realistic for the time and number of people you have (see following page)
- If you have a lot to cover be realistic. Split into groups or hold a second workshop
- Stress that people need to pay attention to detail and spend time on that



See following page for an outline agenda and workshop approaches

CAPTURE AND OUTPUT



What to capture?

- Capture as much as possible – you can always edit down later
- Be sure to photograph maps or number Post-it notes so that sequencing and links are not lost

What output?


- Tidy up and edit after the event. If possible use customers and other people involved in your process to sense-check what you've done
- Make output visual and arresting – use colours and symbols with a clear key

A mapping workshop is a collaborative event, bringing together those who are involved in the system day to day as well as other stakeholders or catalysts for change. Plan ahead to get the most from your workshop.

Mapping the System

RUNNING A SYSTEM MAPPING WORKSHOP

Obviously, any workshop plan will vary according to your specific objectives, input and participants, but here's a suggested outline agenda and some possible mapping approaches.


 OUTLINE AGENDA For a full day workshop	
Introduction and ice breaker	15 mins
Setting the context	30 mins
<ul style="list-style-type: none"> Project background and system mapping principles Objectives for today 	
Understanding your system (see approach on right)	45 mins
<ul style="list-style-type: none"> Share pre-work and inputs from information gathering Define system start and end points 	
Mapping symbols	15 mins
<ul style="list-style-type: none"> Introduce symbols with examples 	
Map systems (see approaches on the right)	60 mins
<ul style="list-style-type: none"> Cover systems for key segments and journeys Work in groups as necessary 	
Share outputs	30 mins
LUNCH	
Problem analysis	45 mins
<ul style="list-style-type: none"> Identify where problems most often occur Identify duplications, diversions, doglegs 	
Share outputs	30 mins
Map 'ideal' system for key segments	45 mins
<ul style="list-style-type: none"> Work in groups as necessary 	
Gap analysis	30 mins
<ul style="list-style-type: none"> Identify key differences between existing system and the 'ideal' 	
Share outputs	30 mins
Agree next steps and close	15 mins

INCIDENT ROOM

Set up a room or large section of wall with lots of stimulus, e.g.

- Photos from different points in the system
- Key documents issued
- Customer communication materials
- Materials from other agencies
- Quotes or insights gathered along the way

See BIA case study, pages 92-3.




WALLPAPER WORKING

Recreate the system on a large sheet of wallpaper. Show all entry and exit points. Identify dependencies and decision points.



POST-IT PARKING

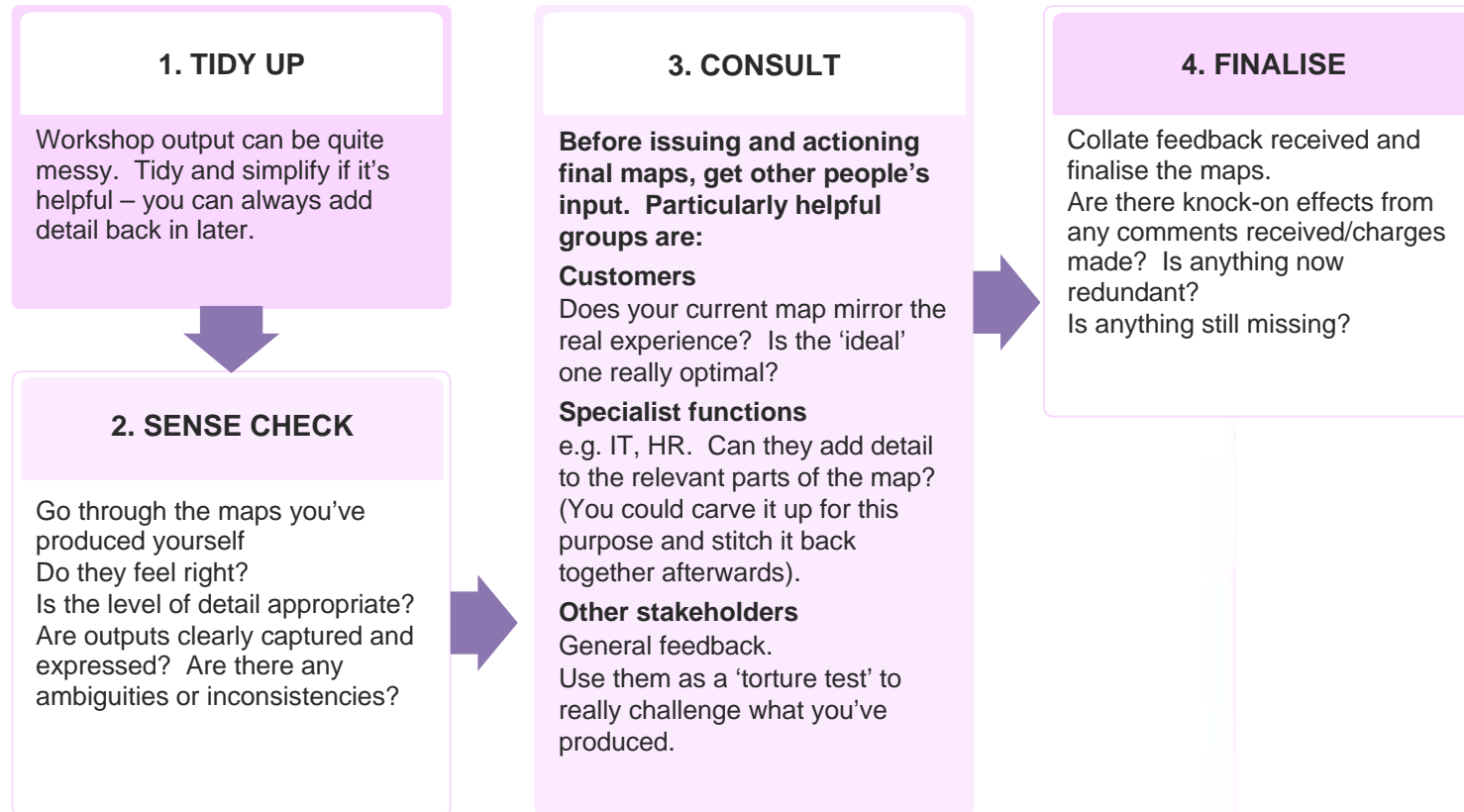
Use Post-it notes to detail each step, arranging them in order to create the sequence of events. Use different colours to represent different mapping symbols. Can be used alongside the wallpaper approach.



Mapping the System

REVIEWING YOUR OUTPUT

If you follow the agenda shown opposite, by the end of your mapping workshop you should have produced, at least in draft form, a map of the existing system or process, a map of the ideal process and an analysis of the differences between the two. Before moving on to action, it's worth spending some time reviewing your outputs:





These checklists are different from the ones on pages 68 and 69. The questions here focus not on what's wrong, but on how you might take action to put it right.

Mapping the System

Taking Action is the most crucial part of the mapping process. Producing a beautiful system map isn't an end in itself - it's what you do with it that counts. Think here, too, about whether you know enough about how people really feel about the process- it there value in mapping the customer experience too?

TAKING ACTION

The work you've done to date should have given you current and ideal system maps and some thoughts about differences between them. The next stage is to turn these thoughts into a tangible action plan, and the checklists opposite set out many of the questions you might be addressing



CHECKLIST 1: IMPROVING THE CUSTOMER EXPERIENCE



CHECKLIST 2: IMPROVING EFFICIENCY



CHECKLIST 3: REDUCING THE COST TO GOVERNMENT



CHECKLIST 4: ACHIEVING TRANSFORMATION

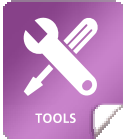
There are four different checklists to encourage you to look at your maps from different angles, but they are NOT mutually exclusive. Achieving cost savings and efficiencies can often go hand in hand with improving the customer experience, as the examples on the back of the foldout sheet will show. Also on the reverse of that sheet are notes and a tool to help you decide which of your possible actions to prioritise.



WORKING WITH YOUR MAP TO IDENTIFY ACTIONS TO TAKE

- Use as a starting point the work you've already done in creating your maps, specifically the identification of problems with the current system, and the gap analysis (comparing current vs ideal)
- Use the checklists to prompt further thinking and add in any new issues or problem areas
- Using the map on which you've recorded problem areas, use Post-it notes to record your ideas on actions and 'solutions'
- When you identify a potential action, think about any knock-on effects that it may have

TAKING ACTION - CHECKLISTS



CHECKLIST 1: IMPROVING THE CUSTOMER EXPERIENCE



Make it simpler

- How can you avoid asking people to do things they've already done (across government as a whole)?
- How can you ensure people are crystal clear who's responsible for each step?
- Can you redesign forms/other materials to make them simpler and avoid errors?
- Should you provide somewhere to go for help and advice?



Make it quicker

- Which are the most time-sensitive steps that you should focus on?
- How can delays be avoided, or the effect of them lessened?
- Where slow progress is inevitable, how can you keep customers informed and lessen negative responses?



Make it more accessible

- How can you ensure people enter the system at the right point?
- How can you improve signposting to direct people to the right place?
- Can you make branding more consistent?
- Should you be offering new or different channels?



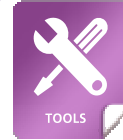
Make it more pleasant

- Which parts of the process should you be focusing on to improve the experience and avoid losing people?
- Where should you set standards for the quality of the customer experience?
- How rigid or flexible should you be? (e.g. how prescriptive in call centres?)



Make it cheaper

- Are there particular steps (and particular customer groups) you should focus on?
- How can you minimise the number of contacts you require customers to make?
- How can you use channels more effectively to manage costs for the customer?



CHECKLIST 2: IMPROVING EFFICIENCY



Save time

- Which steps cause most delays and/or are the priorities to be speeded up?
- How can you clear bottlenecks?
- Where can you combine or eliminate steps to speed up the process?
- Can tasks be automated? Which ones?



Remove duplication

- How can you eliminate repeated steps?
- Can you link systems to avoid multiple data entry?
- Can you put in failsafe procedures to avoid the need for double-checking?
- How can you ensure paper records don't simply duplicate electronic ones?



Reduce complexity

- Can you remove any steps to smooth out 'dog legs' & make a simple path through?
- Is all the data you collect really needed? Who uses it and how?
- What's the simplest route from start to finish? Can you apply this to everyone? If so, how?



Reduce errors

- Can you put in failsafe mechanisms to prevent errors occurring?
- What would help reduce errors? Better staff training? Simpler forms? More help?
- Could you reduce errors by putting sanctions in place if correct procedures aren't followed?



Clarify responsibilities

- How might you better clarify/formalise responsibilities?
- How can you clearly specify ownership of customers, data, decisions?
- How can you work more closely with other departments or agencies to ensure smooth 'baton-changes'?



Use people effectively

- Do you have the right number of people involved?
- Do they have the right skills and training?
- Are they engaged and positive?
- Do you have the right partners on board and are they delivering effectively?



CHECKLIST 3: REDUCING THE COST TO GOVERNMENT



Cut direct costs

- Which costs should you focus on?
- What are the key cost drivers, which can you control, and how might you reduce costs using these?
- How might you save money by shifting the channel mix?
- How can you best deal with the most expensive customers?



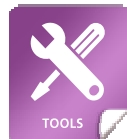
Know the real cost

- In identifying cost priorities, have you included direct and indirect costs?
- How can you include and address costs incurred by other departments or agencies?
- Do charges you make to customers reflect the time it takes to serve them? Is it feasible to do this?



Examine new options

- How can you rework the system to eliminate avoidable contacts?
- How can you encourage people to use more cost-effective channels?
- Where can you switch from paper records and communications to electronic ones?



CHECKLIST 4: ACHIEVING TRANSFORMATION



Be challenging

- Challenge **all** assumptions
- Look at the whole system. Where are the blocks that limit capacity/speed/growth?
- Imagine removing each step of decision point in turn. What would the real impact be? Could you handle this?



Welcome new thinking

- If you were starting from scratch, would you build the system this way?
- Can you really go on tweaking the current system or do you actually need to build a new one in order to operate effectively?
- Can you remove whole parts of the process to simplify dramatically?



Take a broad view

- How does your system interact with other government systems or processes?
- Are you sure you're thinking broadly enough?
- How can you move toward linking the various systems seamlessly?
- How can you remove/reduce 'baton-change' points, so fewer people need to be briefed?



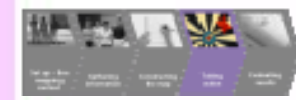
Face up to decisions

- Could you/should you prioritise, to give different levels of service according to customer need?
- Looking at the cost/benefit balance, could you/should you reflect different levels of customer need for transactional processes?



Look to the future

- How can you ensure the system is flexible enough to accommodate likely future changes?
- How do you become aware of macro-trends and their impact on your customers?
- How can you be sure that you're in line with them?



Mapping the System



POSSIBLE ACTIONS AND EXAMPLES

BETTER CUSTOMER EXPERIENCE	IMPROVED EFFICIENCY	LOWER COST TO GOVERNMENT
<p>Cutting unnecessary steps out of a system e.g. HMRC have streamlined the number of steps in a process as a result of journey mapping, contributing to lower costs and greater customer satisfaction.</p>		
<p>Giving more targeted information e.g. HMRC target extra tax advice to those who need it.</p>	<p>Putting in a failsafe to avoid double-checking e.g. Free school meal application system in Tameside now automatically prompts renewal dates.</p>	
<p>Switching appropriate customers to cheaper channels e.g. Dudley Council's channel strategy is currently being validated by considering the customer experience, segmenting the customer base, addressing life events and avoiding departmental silos.</p>		
<p>Improving skills and training e.g. As a result of journey mapping, BIA have specified staff competencies and brought in new training to deliver these.</p>		<p>Reducing staff numbers e.g. Putting services online means lower headcount.</p>
<p>Reducing the number of decision-makers involved at key points e.g. Having reviewed processes, Southwark Council have introduced new front office systems for call centre agents to deliver work orders to field operatives without back office intermediaries.</p>		
<p>More support when needed e.g. The prison service's use of buddies to sit with new inmates.</p>	<p>Removing the need for paper records e.g. When Tameside overhauled the system for free school meal applications, electronic records replaced many paper ones.</p>	
<p>Moving from multiple branding to a single brand e.g. DWP, DH, BERR and DEFRA linked their winter-warmth campaigns, aimed at older people, under one brand. This resulted in fewer help-lines, focused comms and a much simpler customer offering.</p>		
<p>Complete System redesign e.g. The 'Tell us Once' campaign, led by DWP, will result in a linked system that will be much simpler for customers, reduces errors and inefficiencies and will ultimately be much more cost-effective.</p>		

Mapping the System

This page shows the sort of actions that can come out of the system mapping process, identifying where they can bring benefits. It shows how greater efficiency and cost savings can go hand in hand with a better customer experience.

PRIORITISING ACTIONS

When you have identified the actions you might take as a result of the mapping process, you can begin to analyse and prioritise them.

For each one, consider the relative costs and benefits.

You can do this qualitatively using judgment, or quantify it by setting measurable criteria based on your particular objectives. Agree the weighting that should be given to each criteria depending on its relevance and importance to your project.

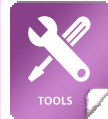
Some examples of possible criteria are:

Possible Criteria	
Cost	<ul style="list-style-type: none"> ■ Financial cost (one-off and ongoing) ■ Time cost ■ People cost ■ Other resource ■ Level of risk
Benefit	<ul style="list-style-type: none"> ■ Better customer experience ■ Improved outcomes ■ Reduced waste ■ Enhanced staff morale ■ Reduction in avoidable contact

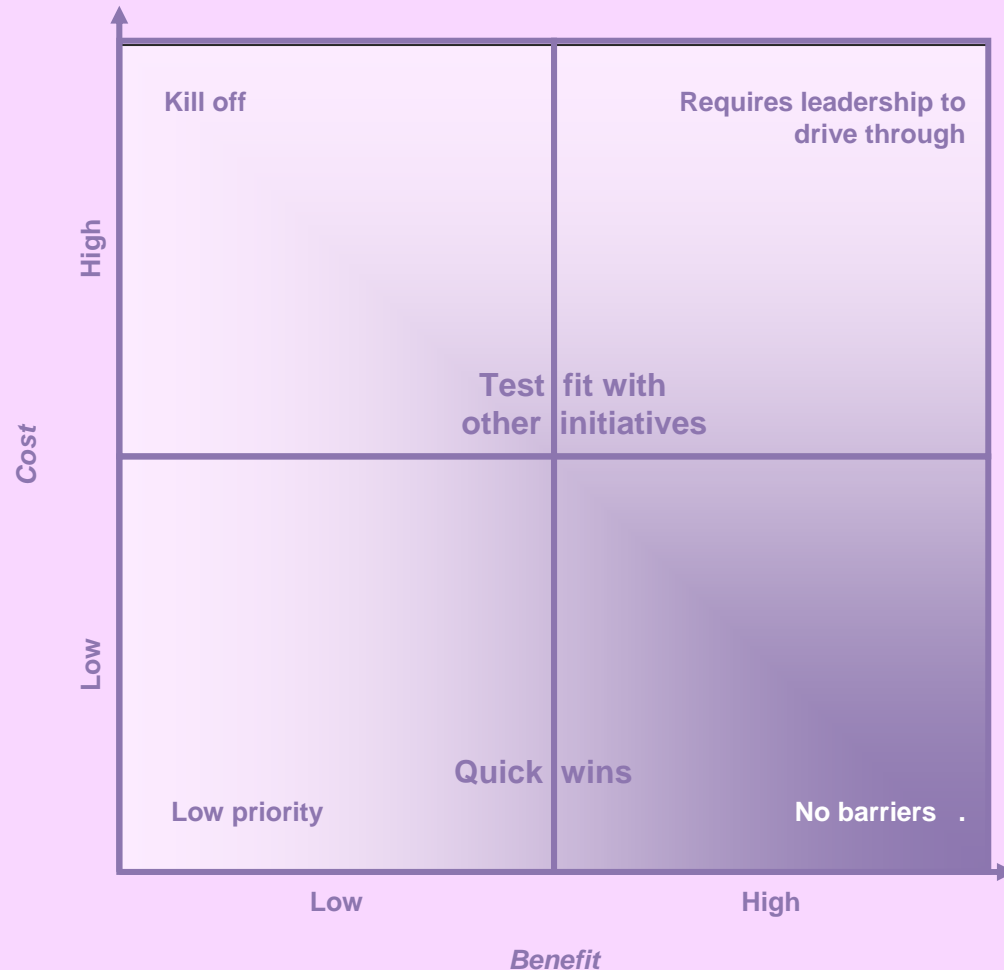
Once you have undertaken the analysis, you can plot the results using the 'Prioritising Actions' tool on the right. This is a relatively simple tool but can really help guide your thinking. A quantified tool for prioritisation is included in the online toolbox.



When thinking about actions, remember the importance of stakeholder commitment. You need the support of stakeholders to make things happen!



PRIORITISING ACTIONS



EVALUATING RESULTS

At the start of the journey mapping process, in the set up phase, one of the actions was to ensure that you set clear, measurable objectives. This is the point at which you need to go back to these and test how well you are performing against them.

Make a judgment about the best time to carry out an evaluation of the actions you have taken. You need to allow enough time for actions to take effect before doing this. Your ability to carry out a quantified evaluation will depend on the information you collected at the mapping stage. The more metrics you used, the more effectively you will be able to analyse progress made. However, if you mapped without using metrics, you can still go through an evaluation process by using benchmarking – see page 53 in Section 3 for details.



Section 5 of this guide gives more practical and detailed information about how to go about measuring the customer experience.

THINGS YOU CAN MEASURE INCLUDE:

Inside out measures:

- Total time taken to complete the journey
- Time taken to complete each step
- Volumes; e.g. number of customers dealt with per hour, number of transactions per day
- Costs of completing each step
- Amount of rework required
- Customer satisfaction
- Number of complaints received
- Cost of handling complaints

Outside in measures:

- Number of steps
- Time taken for whole journey and for each step
- Time/effort/cost required to complete each step



Mapping
the System





CASE STUDY: HMRC COST TO SERVE

HMRC have used mapping the system to look at the cost to serve. Their objective was to redesign complex processes to provide a better experience to the customer at a lower cost to both customer and HMRC. Customer focus and user engagement were key parts of the project right from the start.

"By showing that better customer experiences can go hand in hand with reduced costs we're hoping to shift people from a 'win-lose' attitude to a 'win-win' one."

Mapping the System

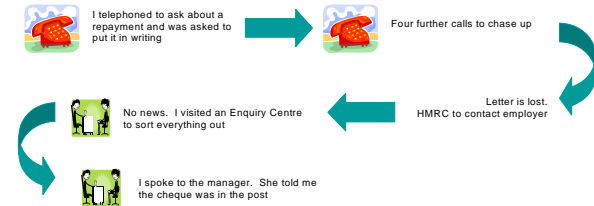
HMRC started the mapping process by identifying the journey to be mapped. They looked at the current and the 'ideal' experience and put in place metrics that would allow them to measure and evaluate results.

This included calculations of the cost, to the customer and to HMRC, of using different channels.

The journeys were then mapped and costed, and comparisons made to look at current versus the future desired experience.

Outputs were clearly laid out using a very visual format.

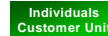
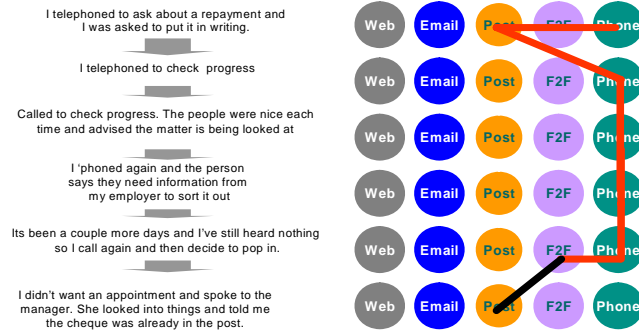
Example Journey: Tax Repayment



This can be shown in different formats to highlight the pattern of the interactions



Customer Journey - Charlie now



Customer Journey - Charlie future

