

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 rows. The top row contains three steps: 1. WebPost, 2. Documents, and 3. Decision. The bottom row contains three steps: 4. Arrival, 5. Checks, and 6. Extension. Each step includes a brief description of the process. To the right of the flowchart is a photograph of a service counter with various signs and staff members.

Page 94-5

The image features the HM Revenue & Customs logo and two comic strip panels. The comic strips use a cartoon format to depict a customer's experience, with characters representing different stages of the process and their interactions.

Page 96-7

The image displays the Eurostar logo and a 'EUROSTAR JOURNEYMAP' line graph. The graph plots various touchpoints and activities along the customer journey, from departure to arrival. Key touchpoints include 'Departure', 'Boarding', 'Check-in', 'Set off', 'Lével tuffat', 'Counting', 'Enter tunnel', and 'Arrival'. The graph shows the progression of the customer's experience through these stages.

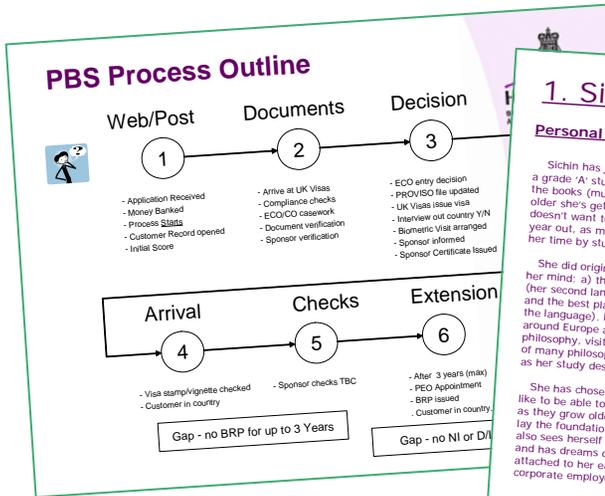
Page 98-9

The image shows the Tameside Metropolitan Borough logo and a 'FREE SCHOOL MEALS - CURRENT JOURNEY' flowchart. The flowchart is divided into five stages: Application, Booking, Applying, Waiting, and Receiving. Each stage includes a list of activities and touchpoints. To the right of the flowchart is a vertical flowchart showing the sequence of steps in the process.



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



1. Sichin Ho

Personal Profile

Female, Single, 18, Chinese.

Sichin has just finished her compulsory studies in China. She is a grade 'A' student and spent her teenage years with her nose in the books (much to the delight of her proud parents). Now she's older she's getting itchy feet and feels the need to travel. She doesn't want to interrupt her study plans so instead of taking a year out, as many of her friends have, she wants to make use of her time by studying and travelling simultaneously.

She did originally want to go to America but two things changed her mind: a) that in order to study in an English speaking country and the best place to learn English is in England (as the origin of the language), b) England leaves her in a good position to travel philosophy, visiting Europe has a big appeal to her as the birthplace of many philosophies. For these reasons Sichin has chosen England as her study destination.

She has chosen to study economics at university as she would like to be able to provide for both any future family and her parents as they grow older. She believes that a degree in economics will lay the foundations to a high salaried job in a multinationals. She also sees herself working in a fast-paced, high-risk environment attached to her car, an impression she has of all high salaried corporate employees.

As part of the mapping process, the BIA looked at broad process outline and built up detailed pen portraits of applicants in each segment, as well as mapping their own individual journeys.

Process - Applying for entry clearance as a short term student

Current Business Touch Points	UK Visas / Outsourcing post - Beijing	UK Visas / Outsourcing post - Beijing	UK Visas / Outsourcing post - Beijing	UK Visas Office - Beijing	UK Visas Office - Beijing	UK Visas Office - Beijing
Sichin's Expectations Of Process	Stage 1 Applying online and submitting documents via secure post. Or submitting to an Outsourcing post.	Stage 2 Payment is processed	Stage 3 Application and documents are joined and a check is done to ensure it is complete	Stage 4 The Risk assessment for Compliance & Biometrics checks are completed	Stage 5 Attend to have Biometrics taken and for the interview	Stage 6 The ECO makes the decision
Questions	- If applying online, will they receive an personal identity No.	- Can stage 2 & 3 be completed simultaneously	- Can stage 4 & 5 be completed simultaneously	- Will the Customer have to pay an additional fee	- Will the applicant be able to contact the decision maker	- 3 rd party do Biometrics? - How long and what method to they receive the card?
Problems	- Delay on Website - Documents get lost in the post	- Payment not accepted - Documents not received	- Application not joined to Docs - Documents incomplete - Documents not received	- Compliance check not passed - Biometrics check not passed	- Missed appointment - Missing appointment card having to rebook - Delays in arranging an appointment	- Interview refused - No right of appeal - Hearing required to leave the country

KEY LEARNINGS

- Early involvement of an Implementation Manager meant that action planning was part of the process from the start
- It's important to talk to both managers and people on the ground – the greatest value comes from contrasting their views
- The working wall was a hugely effective tool, both for working out journeys and selling the outputs of the exercise
- The sell-in needs to be extended and persistent – BIA had to earn their resource and budget by proving the value of the work

We did a lot of marketing by stealth, with persistent meetings to get the buy-in we needed

Case Studies

ACTIONS AND OUTCOMES

The mapping work has resulted in a greater customer focus, delivered with improved efficiency. Journey mapping has been used to re-design application forms and to design a new on-line points-based system for applicants. Service and strategy standards have been defined, and service level agreements have been established with different parts of the operation. Implementation plans have included the identification of staff competencies and new training programmes to ensure people have the skills they need. Most recently, a focus on metrics has allowed BIA to calculate costs and volumes, which they are applying to all priority segments.



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.





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.

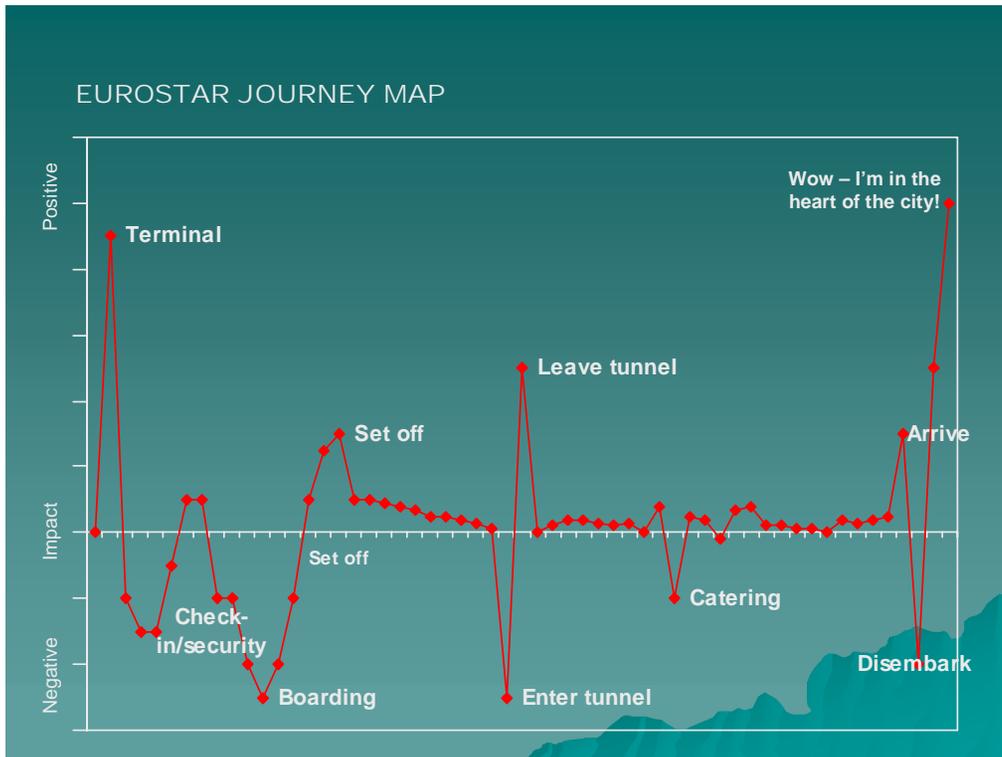


APPROACH

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

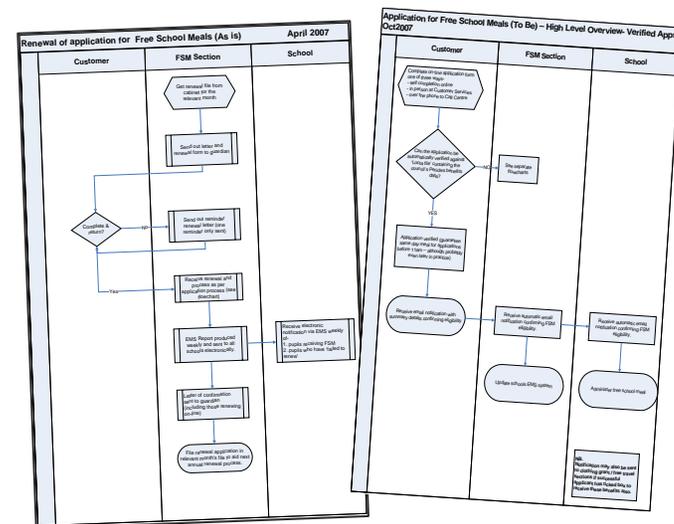
BACKGROUND AND OBJECTIVES

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.

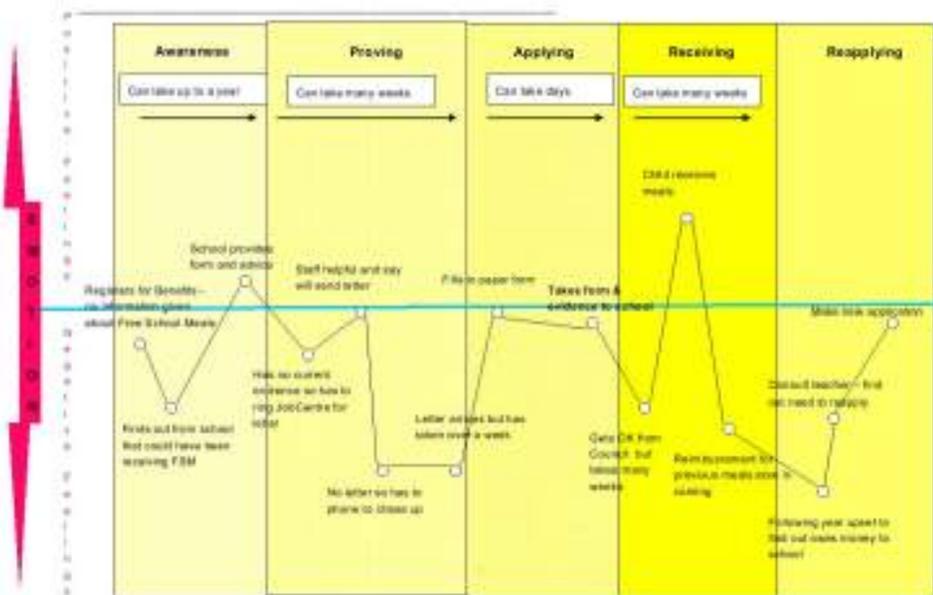


System maps were produced for current and 'ideal' experience

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.

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