Understanding Your Customer's Experience: Journey Mapping and Data Collection

Resource Manual
EDUCAUSE 2016

INFORMATION TECHNOLOGY
UNIVERSITY of WASHINGTON
Workshop Team Biographies

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Karalee Woody is responsible for UW-IT’s customer experience. Her division hosts the University’s Enterprise Service Desk providing 24 x 7 support to UW faculty, staff and students. It is also responsible for monitoring systems, managing service impacting incidents, metric and survey development, business analysis and workflow modeling to ensure an excellent customer experience.

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Cara Giacomini is research scientist with extensive experience conducting quantitative and qualitative studies. Her work helps the University understand the technology usage and support trends of faculty, students, staff, and researchers. She is also responsible for efforts in peer benchmarking and continual service improvement. In 2003, Cara received her PhD in English and Textual Studies from the University of Washington. Her scholarship and teaching focused on the Digital Humanities.

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Jeff Blancato is a Business Analyst in the Customer Service and Support division of UW Information Technology. Prior to joining UW-IT in 2014, he served as an IT Director at the UW School of Law for ten years. Jeff holds a BA in English with a Marketing concentration from Boston College.

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Shea Jacobson is a Data Analyst for the Customer Service and Support division of UW Information Technology. Shea received her Bachelor of Science in Statistics in 2016 from the University of Washington, and worked as an email analyst in the UW Information Technology Service Center for two and a half years prior to earning her degree.
**ACTIVITY 1 - Your Experience**

**Time:** 3 Minutes

**Format:** Personal Reflection

**Instructions:**

➢ Think about a business with which you recently engaged
➢ In the space below, note how you thought and felt about following aspects of your engagement

<table>
<thead>
<tr>
<th>Business Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>People</td>
</tr>
<tr>
<td>Places</td>
</tr>
<tr>
<td>Services</td>
</tr>
<tr>
<td>Support for those services</td>
</tr>
<tr>
<td>Communications (Web sites, email, etc)</td>
</tr>
</tbody>
</table>
ACTIVITY 2 - Learning about Customers

Time: 5 Minutes

Format: Personal Reflection and Share with a Partner

Instructions:
➢ Jot down an example of how your institution has sought to learn about the customer experience
   ○ What do you see as the strengths and weaknesses of that approach?
➢ Share with a partner

Your Example
Notes
ACTIVITY 3 - Basic Journey Map

Time: 10 Minutes
Format: Small Groups

Instructions:
➢ Work with colleagues at your table
➢ Refer to the definitions below as needed
➢ Follow the steps outlined on the next page to fill out the template provided

Definitions

Scenario - The specific situation being visually depicted in a journey map.

Persona - A generalized representation of a particular type of customer taking the journey depicted in a map. Elements of a persona include the customer’s demographics, mindset, history with your organization, goals, likes/dislikes, etc.

End Point - The desired outcome achieved or obtained by the customer at the conclusion of their journey.

Start Point - The action(s) or condition(s) that lead a customer to begin a journey.

Interaction - Events in which a customer and an organization are in active contact; where you and your customer (virtually or physically) meet.

Channel - The (virtual or physical) setting in/through which an interaction takes place.
Activity 3: Basic Journey Map

**STEP 1:** Select a *scenario* from the following options and add it to the template on the next page:

- Resetting an account password
- First use of the Learning Management System
- Mobile device stops connecting to the campus wi-fi network
- Becoming a user of the data center
- Obtaining basic IT services as a new member of the University
- Write your own

**STEP 2:** Select a *persona* from the following options and add it to the template on the next page:

- Faculty member
- Staff member
- Student
- Researcher
- Librarian
- Write your own

**STEP 3:** On your template, describe *start* and *end points* for your scenario

*Tip: it can often be easier to identify the end point first*

**STEP 4:** List three *interactions* that may/will take place between the start and end points

**STEP 5:** Add the *channels* where the interactions you listed may/will take place
Activity 3: Basic journey map template

Scenario:

Start

Interaction:
Channel:
Description

Interaction:
Channel:
Description

Persona

Interaction:
Channel:
Description

End
ACTIVITY 4 - Adding to Your Map

Time: 10 Minutes

Format: Small Groups

Instructions:
➢ Work with colleagues at your table
➢ Refer to the definitions below as needed
➢ Follow the steps outlined on the next page to fill out the template provided

Definitions

Phase - Describes related, sequential activities which add up to a contiguous, high-level stage.

Touchpoint - An interaction in the context of the channel in which it happens.

Thoughts/Feelings - Refers to those of the customer before, during, or after an interaction with your organization.

Moments of Truth - “Make or break” points in a journey, critical to the health and future of the relationship between the org and their customer.
## Activity 4: Adding to Your Map

### STEP 1: Fill in the *scenario, persona* and *channels* from Activity 3 on the template.

- *Note: Don’t add the interactions yet!*

### STEP 2: Reflect on the scenario as a whole and identify up to three *phases* a customer moves through on their journey

- Add the *phases* to your map in the spaces provided.

### STEP 3: Add *interactions* to your map, by doing the following:

- Review the *interactions* you identified in Activity 3
- Identify the *phases* in which they occur
- Add dots on the map to represent each *interaction*, aligning each dot (horizontally) with the *channel* in which it occurs and (vertically) under the appropriate *phase* *(see example)*
- Add simple labels
- Connect the dots to mark the journey over time

*Note: Don’t worry if multiple interactions occur in the same phase*

### STEP 4: Indicate *thoughts* and *feelings* on your map, by doing the following:

- Referring to the touchpoint legend on the template, review each *touchpoint (channel + interaction)*
- Add the appropriate symbol to indicate if it is positive, negative, or neutral

### STEP 5: Put a star next to a *touchpoint* that represents a *moment of truth*

*Note: if you cannot identify a moment of truth, brainstorm what one would be*
Activity 4: Add to your map

Scenario:

Phases

Channels

Interactions

Touchpoint Legend

Neutral experience
Positive experience
Negative experience
Moment of Truth
ACTIVITY 5 - Data Collection

Time: 10 Minutes

Format: Small Groups

Instructions:

➢ Work with colleagues at your table
➢ Review the data collection overview provided on the next two pages
➢ After the data collection overview, you will find the instructions and template for Activity 5
➢ Follow the instructions to complete the template

Notes
Surveys

Types
- Large Population
  - Sampling of all customers
- Population Segment
  - Users of a particular service
- Transactional
  - At point of contact
- Benchmarking
  - EDUCAUSE Core Data Service

Strengths
- Offers anonymity/confidentiality
- Reaches large numbers
- Connects to industry standards
- Tracks trends over time

Weaknesses
- Limited context
- Only learn what you ask
- Often have low response rates
- May not keep pace with needs (trends/benchmarks)

Interviews and Focus Groups

Types
- Focus groups
  - Often scripted/repeatable
  - Good for larger numbers
- Individuals/Small Groups
  - Level of scripting varies
  - Can include on-site visits
- Observation/Activities
  - Ethnography
  - Traditional UX Design

Strengths
- Captures first-hand experiences
- Can learn things you don’t ask
- Builds relationships
- Adds context

Weaknesses
- Small numbers of participants
- Time/resource intensive
- Often reach “usual suspects”
- Seldom longitudinal
Tool Dashboards

Types

- Data sources
  - Ticketing systems
  - Service management
  - CRM
  - Population databases
  - Monitoring
  - Service usage

- Reporting
  - In-tool options
  - Export to other tools

Strengths

- Find patterns in large numbers of interactions
- Combine multiple data sources
- Real-time information

Weaknesses

- Not personal, doesn’t capture emotions/perceptions
- You get what you measure
- Data limitations (tied to quality of your data source)

Artifact Analysis

Types

- Contents of records in a ticketing system
  - Phrasing of inquiry
  - Content of response
  - Audit history

- Customer-created materials
  - A few examples:
    - LMS course materials
    - Student portfolios
  - And many more...

Strengths

- Documents actual uses/interactions
- Can learn things you don’t ask
- Helps understand outliers
- Adds context

Weaknesses

- Time/resource intensive
- May not be representative
- Privacy concerns
- Permissions/approvals (eg, IRB)
Activity 5: Data Collection

**STEP 1:** Fill in the *scenario* and *persona* on the template

**STEP 2:** Select a *touchpoint* (*interaction* + *channel*) from your map in Activity 4
- Add your selected *touchpoint* to the template
- *Tip:* A *touchpoint* associated with a *moment of truth* would be the best choice for this activity

**STEP 3:** Add *data collection* options, by doing the following:
- Consider what you want to know from customers about this *touchpoint*
- Based on your review of the materials on the previous two pages, select up to three ways you could gather data to learn more
- Add the *data collection* methods you identified to your template

**STEP 4:** If time allows, discuss the *data collection* options you identified and circle the one the group believes will provide the most useful data
Activity 5: Data collection

Scenario:

Touchpoint:

Data:

Data:

Data:
ACTIVITY 6 - Workshop Follow Up

Time: 5 Minutes

Format: Discussion

Instructions:
➢ Based on what you learned today, what is one thing you will do:
  ○ Next Monday
  ○ This Month
  ○ This Year

Notes
References

Slides


Images

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**Other Recommended Resources**


Annotated Bibliography

Brooks, D. Christopher, and Terri-Lynn B. Thayer. March 2016. *Institutional Analytics in Higher Education.* Distributed by EDUCAUSE. <https://library.educause.edu/~/media/files/library/2016/2/ers1504ia.pdf>. This report addresses institutional analytics, and uses finding from a “2015 survey data collected on the topic of analytics, interview and focus group data, and 2014 EDUCAUSE Core Data Service (CDS) data.” They found that many institutions believe that “analytics is a major institutional priority” but fewer actually implement analytics. The report discusses institutional uses of analytics in five areas, citing business and student management analytics as the most heavily used, possibly because of functional and readily available data. The report goes on to list guidelines for using analytics to make improvements. Starting with defining problems that data might help solve, then identifying the data available and the data an institution would like to make available, which can be made available through implementing strong data “standards, as well as data-integration technology.” It then advises that an institution should find the best systems and technologies to deploy and deliver analytics, evaluating what can be done with the data and how it can be collected and analyzed. The report also puts an emphasis on ensuring that there are strong analytics improvement leaders with the ability and skill to make decisions relating to data. The report ends listing three skills that are required for success with analytics: IT, data science, and business, stating that knowing how to use them together and efficiently will provide “actionable insight.”

Saunders, JP. October 2015. *Modern Customer Service Mapping the Journey Ahead.* Distributed by Oracle. <http://customerthink.com/files2/resources/Oracle-Modern-Customer-Service-Mapping-the-Journey-Ahead.pdf>. Saunders describes focusing on improving customer experience with three main steps; getting going, getting better, and getting ahead with strategies focused on multi, cross and omni-channels. His main point is in order to grow, maintain and profit, a business must place “customer service at the heart of [their] business and Customer Experience efforts.” Each section reiterates the need to listen to customer insight, create unified silos, and focus on the need and wants of customers for all three steps of modernizing customer service. Saunders focuses on streamlining and unifying as a means of cost reduction and customer retention through strengthened customer satisfaction. Using many connected and unified channels to increase ease for customers and agents will allow for easier data to collect and implement. Which, in turn, will provide reliable service and the ability to glean opportunities from customer engagements in order to understand customers and innovate convenient and consistent service.

Yanosky, Ronald, with Pam Arroway. October 2015. *The Analytics Landscape in Higher Education, 2015.* Distributed by EDUCAUSE. <https://library.educause.edu/~/media/files/library/2015/5/ers1504cl.pdf>. This article focuses on how analytics are used in higher ed institutions based on a study the organization conducted. It outlines institutions views of analytics, trends in how data is collected and used, common concerns from institutions that the study noted, and recommendations for taking advantage of and using data analytics. The article noted that many are “struggling to realize the potential of analytics and to find the resources necessary for its optimal use.” Many institutions are using data to look backward rather than to move forward, and do not have the necessary leadership or investment to do so. The article points out that, in general, higher education institutions are more concerned with institutional analytics than they are with...
learning analytics. The difference between the two is that institutional is “intended to improve services or business practices” while learning is “intended to enhance or improve student success.” The article ends with recommendations for improving analytics, including; making institutions aware of their analytics maturity, defining their strategy for improvement, and balancing institutional and learning analytics.


This article focused on the importance of unification and the impact of cumulative interactions, rather than treating all customer interactions separately. Isolating interactions only addresses some problems, causes customer dissatisfaction, and does not resolve any underlying issues. The focus of Customer Experience (CX) should be on the customer journey; identifying it, understanding the process, streamlining a consistent customer experience, and continuing to improve it. The article also focused on the importance of unified communication channels and systems. Communication channels that run through separate silos cause a loss of sight of the overall goals, unifying the channels effectively allows for CX optimization from end to end and improvement by allowing customers to easily switch channels. The article argues that not only should unification happen for customer communication, but also internally. A centralized knowledge repository is important for providing consistent and accurate information, ultimately improving CX. The article ends with a description of a proactive business as one that focuses on CX improvement, uses communication channels tailored to their customers, and is able to engage customers before they realize they have an issue.


This article discusses the focus of customer desire to see personalization and transparency through their interactions with brands and with the feedback they provide. The article makes a point to specify that both positive and negative customer feedback are important for companies and employees to be aware of. Only showing negative feedback can put too much emphasis on the bad and cause some to believe all of the feedback to be negative. Customer feedback trends were measured, what brands thought customers wanted and what the customers actually thought was important. Most measures had disparity between the two groups, but both believed customer experience to be the highest importance. The article goes on to describe two good models of interaction, ‘Consumer-Merchant’ and ‘Human-Human’, both have different views on personalization. Consumer-Merchant interaction focuses on ‘ease of business’ and ‘consistency’, where personalization is defined as creating a straightforward and efficient process for the customer. On the other hand, Human-Human interaction frames companies as people, ‘empathy and caring’ are important, and personalization means giving “distinctly human responses” to customers. But it is important for companies to know when to use which method of interaction, tailoring to the customers wants and needs. The article ends discussing the powerful benefits from allowing customers to give feedback “in a more natural, story-telling fashion” and including customers in how their feedback will be used to make a difference.
Notes
# Health Insurance Purchase Journey Map

## Young Families Segment

The Young Families Segment is primarily made up of 25-35-year-olds with 1 or 2 children. With their busy lives, they rely heavily on the internet to do their research, whether through their computer, tablets, or smartphones. They primarily talk to friends and family (especially other young parents) to make decisions.

Access to their children’s pediatrician is the make-or-break criterion for a health plan. Once that is known, premium and wellness options are also important, as are an easy-to-use website and:

- **Short Process**
- **Long Process**
  - Do Not Consider Brand
  - Brand Shopper
  - Prefers Simplistic

“I would have liked Frequently Asked Questions or would like to talk to an online person. I’m not a paper person so did everything online.” – Young Families Customer

“The only problem is there are so many choices. I’m not sure if that makes it easy or hard. It was overwhelming - difficult because there is a lot to think about and it felt hard to figure out what was best.” – Young Families Non-Customer

Create your own Customer Experience Journey Map

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## Journey Map

<table>
<thead>
<tr>
<th>Phase</th>
<th>Awareness</th>
<th>Research</th>
<th>Choice Reduction</th>
<th>Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal</strong></td>
<td>Duration: 1 week</td>
<td>Duration: 2-3 weeks</td>
<td>Duration: 1 week</td>
<td>Duration: 1 day</td>
</tr>
<tr>
<td>Your consumers begin by just learning about the health plan options. The key goal at this stage is to understand how the different plans work, and to develop the list of questions to ask.</td>
<td>At this stage, consumers are conducting research to expand the consideration set. While some choice reduction happens along the way, the primary goal is to broaden the consideration set and determine the final criteria for making a choice.</td>
<td>At this point, the consumers have the criteria set and have mostly finished the discovery phase. Now, they focus on narrowing down the list from 2-3 candidates to the final choice.</td>
<td>The final decision is made, and the purchase process is completed.</td>
<td></td>
</tr>
</tbody>
</table>

## Touch Point Map

<table>
<thead>
<tr>
<th>Touch Point</th>
<th>Employer Site</th>
<th>Health Insurer Site</th>
<th>Google, Third-Party Sites</th>
<th>Social Media</th>
<th>Friends and Family</th>
<th>Print Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial consumers begin the process by looking through their employer’s site most. Young Families members do not attend employer-sponsored meetings. Individual consumers skip this step, but follow mostly the same process.</td>
<td>If the process continues, Young Families members review the plan sites of the expanded consideration set.</td>
<td>Consumers use Google to research non-employer based options. eHealthInsurance.com is a common destination. This becomes a Moment of Truth, as this step determines whether the research stage ends quickly or continues onto reviewing options outside of those offered by the employer.</td>
<td>Facebook is used by about 1/3 of members to ask what providers are best and to get feedback.</td>
<td>Young Families members search for reviews on plans. While premium cost is the top criterion, many are frustrated by the lack of useful comparisons outside of cost. Those not using eHealthInsurance.com typically make their own spreadsheets to provide cost comparisons. At this moment of truth the list is reduced to 2-3 providers.</td>
<td>The final Moment of Truth involves seeking friends and family opinions to understand the quality of service provided by the health insurer. If costs are about equal, the word of mouth is used to make the final selection.</td>
<td></td>
</tr>
</tbody>
</table>

## Legend

- **Touch point (Area of interaction)**
- **Moment of Truth (Critical Interaction)**

### Satisfaction with Touch Point

<table>
<thead>
<tr>
<th>Stage</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Satisfaction</td>
<td>Importance</td>
<td>Satisfaction</td>
<td>Importance</td>
<td>Satisfaction</td>
<td>Importance</td>
<td>Satisfaction</td>
<td>Importance</td>
<td>Satisfaction</td>
<td>Importance</td>
</tr>
<tr>
<td></td>
<td>8.2</td>
<td>7.5</td>
<td>6.2</td>
<td>6.3</td>
<td>8.3</td>
<td>7.5</td>
<td>6.4</td>
<td>8.3</td>
<td>6.4</td>
<td>6.3</td>
</tr>
</tbody>
</table>

## Level of Effort

<table>
<thead>
<tr>
<th>Customer Effort Score</th>
<th>About the Effort I Expected</th>
<th>Far More Effort Than I Expected</th>
<th>Slightly More Effort Than I Expected</th>
<th>Far Less Effort Than I Expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.9</td>
<td>4.3</td>
<td>3.7</td>
<td>1.6</td>
<td></td>
</tr>
</tbody>
</table>

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