Accessible Client Service:

Client Journey Map Templates

# Purpose

The emotional journey experienced during a service interaction is often overlooked but remains a critical part of the client experience.

A client journey map provides a visual representation of the entire client experience, from your client’s perspective. It captures their interactions with your organisation and identifies touch points, pain points, and generates opportunities for improvement.

These ones are designed to help you assess accessible client service across multiple policy and service improvement initiatives.

# Key Definitions

Personas: Characters that are based on key behaviours, attitudes, motivations, and goals of an organization’s target clients. They are created from primary research with real clients and take the form of a vivid narrative description of a single person who represents a behavioural segment.

Client interactions: Any action between your clients and your organization, department or agency. For example: looking for information, visiting your website, filling out forms, reading correspondence, calling 1-800-O-Canada, visiting your service office, receiving an email, or receiving text notifications.

Touch points: An area where your clients are likely to experience difficulties or negative emotions when interacting with your organization, department or agency. Identifying touch points is one the first steps toward creating a journey map.

Pain Points: Interactions between the client and the organization where the client experiences difficulties or negative emotions. Sometimes referred to as defining moments.

# Methodology

## **Step 1**: Understanding your client’s reality

You must identify the symptoms related to the type of disability or functional limitations and the emotional behaviours that relates to how your client feels throughout each interaction.

Key Actions

* Define who the clients are, including third-parties who act on the clients’ behalf.
* Include the users and people who accompany clients on the journey.
* Develop an engagement plan to outline how to collect front-line employees’ and
program experts’ insights on clients.
* Ideally, 80% of program clients should be represented in your personas.

## **Step 2**: Tracking your client’s interactions

You need to describe the experience using all six phases of the client journey. This will capture a high-level understanding of your client-service, particularly in the areas of:

* physical access to buildings and offices
* program and service delivery channels
* employee training on & awareness of accessibility and human interaction.

## Key Actions

* Use the program’s internal process and workflows to confirm touch points or identify new ones.
* Hold workshops to sketch preliminary current state journey maps,
which include touch points and pain points, by having staff act as proxies (i.e. when clients are not available) and getting them to go through the journey.
* Confirm pain points. These are key to identifying the opportunities for improvement (such as what needs to be fixed).

## **Step 3**: Improving client experience

You then need to assess your client’s need within each channel (current state) and map them against the capabilities needed (future state) to identify the gaps and provide barrier-free accessible client service.

## Key Actions

* Validate touch points and pain points with clients (if possible) or use proxy information, such as client insight reports, surveys or quantitative sources.
* Conduct a gap analysis to resolve pain points and identify opportunities to improve the client experience.
* Validate, adjust and finalize the current state journey maps in light of the feedback received from various workshops and consultations.
* Identify opportunities for improvement with program and policy experts.
* Develop metrics in collaboration with partners. Partners need to own the metrics.

**Current State** Client Journey Map Template

## The current state is a diagnostic tool and is the most common type of journey map.

## **Client profile**

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### **Client's first name**

### **Persona**

* Age
* Type of disability
* Client need  / purpose for accessing our services

### **Disability symptoms**

* Medical condition preventing the client to easily access our services

### **Client's reality**

* Client’s functional limitations and emotional behaviours when using client interaction channels (Online, Phone, In-person, etc.)

## **Client journey phases**

### **Phase 1: Aware**

| Client actions (doing) | Client interactions | Service barriers | Client experience |
| --- | --- | --- | --- |
| Knowledge of the information (what triggered the service need) | Identify the channel used to access information about a program or service. | Identify what prevents the client from getting the information. | Identify the client satisfaction (emotions/feelings). |

### **Phase 2: Inform**

| Client actions (doing) | Client interactions | Service barriers | Client experience |
| --- | --- | --- | --- |
| Choice of channel for the initial point of contact | Identify the channel used to access information about a program or service. | Identify what prevents the client from having immediate access. | Identify client satisfaction (emotions/feelings). |

### **Phase 3: Advise**

| Client actions (doing) | Client interactions | Service barriers | Client experience |
| --- | --- | --- | --- |
| Key details of the service request and information available for support | Identify the channel used to access information about a program or service. | Identify what prevents the client from understanding the information. | Identify client satisfaction (emotions/feelings). |

### **Phase 4: Identify**

| Client actions (doing) | Client interactions | Service barriers | Client experience |
| --- | --- | --- | --- |
| Action followed by the information gathering | Identify the channel used to access information about a program or service. | Identify what prevents the client from providing the right level of information. | Identify client satisfaction (emotions/feelings). |

### **Phase 5: Apply**

| Client actions (doing) | Client interactions | Service barriers | Client experience |
| --- | --- | --- | --- |
| Steps to complete the service goal | Identify the channel used to access information about a program or service. | Identify what prevents the client to go through a business process. | Identify client satisfaction (emotions/feelings). |

### **Phase 6: Manage**

| Client actions (doing) | Client interactions | Service barriers | Client experience |
| --- | --- | --- | --- |
| Service value and next steps | Identify the channel used to access information about a program or service. | Identify what prevents the client from  tracking and following up. | Identify client satisfaction (emotions/feelings). |

**Future State** Client Journey Map Template

The future state is an ideal representation of what clients expect in the future and the way they want to interact with your organization, department or Agency. The future state is best suited for communicating the vision for how programs and services could be designed and delivered.

## **Client profile**

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### **Client's first name**

### **Persona**

* Age
* Type of disability
* Client need  / purpose for accessing our services

### **Disability symptoms**

* Medical condition preventing the client to easily access our services

## **Client journey channels**

### **Channel 1: Online**

| Client’s reality | Service improvements | Client experience |
| --- | --- | --- |
| Client`s functional limitations and emotional behaviours when using client interaction channels. | Assistive technology, policy & service design, and employee training that can reduce or eliminate the barriers within each respective channel. | Client’s perspective describing the service experience. |

### **Channel 2: Telephone**

| Client’s reality | Service improvements | Client experience |
| --- | --- | --- |
| Client`s functional limitations and emotional behaviours when using client interaction channels.  | Assistive technology, policy & service design, and employee training that can reduce or eliminate the barriers within each respective channel. | Client’s perspective describing the service experience. |

### **Channel 3: In-person visits**

| Client’s reality | Service improvements | Client experience |
| --- | --- | --- |
| Client`s functional limitations and emotional behaviours when using client interaction channels. | Assistive technology, policy & service design, and employee training that can reduce or eliminate the barriers within each respective channel. | Client’s perspective describing the service experience. |

# Tips on project planning

* If you are just starting to journey map, consider it as a pilot.
* Engage partners early.
* Know where the program is at in terms of a roadmap and how the journey map can be used to validate the roadmap, generate thinking and create opportunities
* Ensure partners understand the journey mapping methodology, business value and terminology.
* Gather as much information on program functions and client base of the map. Front line staff are an excellent source of client information.
* Seek an ‘expert’ resource from the program/policy team to work with the journey
mapping team.
* Define purpose or scope of map early on (e.g. current state experience vs. future state experience).
* Develop a glossary of terms to forge a common understanding among stakeholders and partners.
* Ensure the program develops their own performance metrics.
* Factor in business capability improvements to future state journey map to ensure transformation can be realized.
* Ensure a roadmap is developed once service improvements and opportunities are identified and approved.
* Establish a governance structure to make appropriate decisions on service
improvements and transformation opportunities.
* Establish ongoing monitoring, measurement, reporting and course correction
practices.
* Identify champions for buy-in and to promote the journey mapping exercise.