



# Using Customer Centered Design to Improve the Customer's Experience

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# What is Customer Journey Mapping/ Customer Centered Design?

- ▶ *“The sum-totality of how customers engage with your company and brand, not just in a snapshot in time, but throughout the entire arc of being a customer.”*

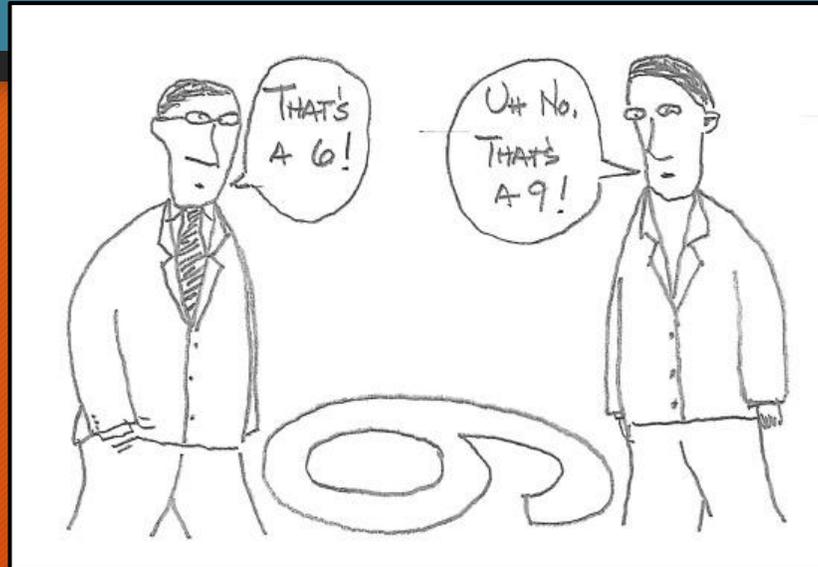
**Harvard  
Business  
Review**



# Understanding Motivation: The Client's Journey Through the Program



# Two different perspectives



## Agency Perspective

Run a smooth process even if client needs are secondary to meeting the requirements of the process/grant.

## Client's Perspective

Make every effort to sense, serve, and satisfy the needs and wants of the clients within the constraints of the budget and other resources/demands.

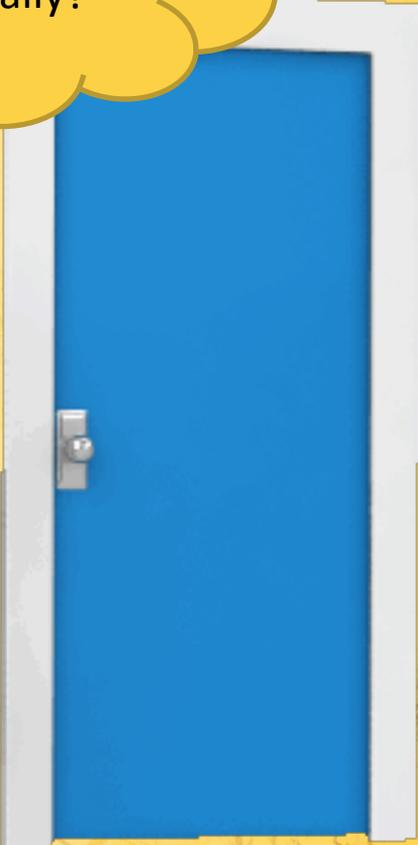
WALK A MILE  
IN MY SHOES



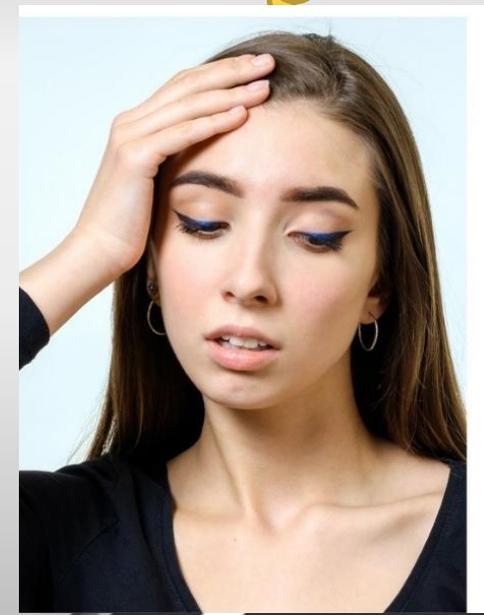
# Waiting At Office for Initial Appointment

Who will I get? How much longer will it be?

What can they do for me really?



I don't understand what this is about. I am not sure how this works.



How much longer? This is boring.



# Impersonal Paperwork, Forms, and Documents

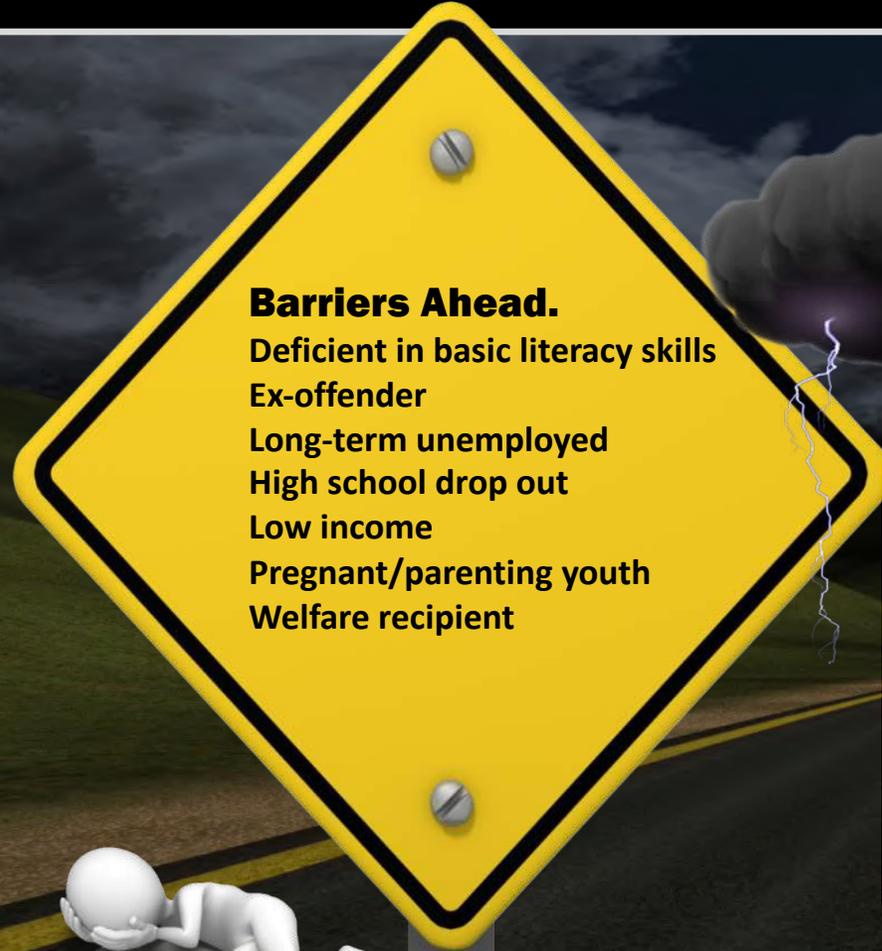


Why are they asking this?  
Where is my job?



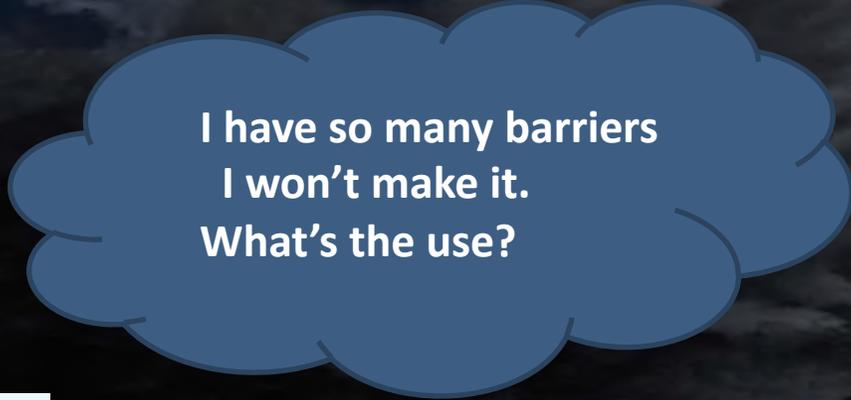
I already answered that question three times already.





**Barriers Ahead.**

Deficient in basic literacy skills  
Ex-offender  
Long-term unemployed  
High school drop out  
Low income  
Pregnant/parenting youth  
Welfare recipient



I have so many barriers  
I won't make it.  
What's the use?



**How our terms and language can reinforce low self-esteem, raise the psychological price, and turn off participants**

# Why it Matters



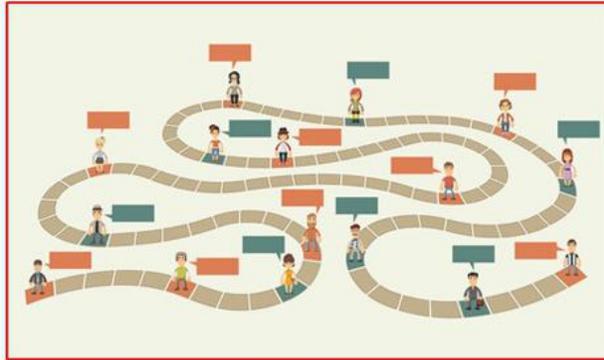
- ▶ **We all make choices based on our customer experience.**
- ▶ **Motivation, participation, commitment, engagement and retention is directly tied to the customer's experience.**

# What are the Benefits of Customer Journey Mapping?

- Target limited resources for maximum impact
- Plan for an efficient customer experience - reduce duplication and shorten the process
- Identify where customers are being confused or feeling the process is impersonal
- Identify problems, where the process breaks down, without blaming
- Set performance indicators and standards

# Articulate a Vision For Your Program

Write a vision for your program:



What do you want your customer to “think” as they experience your service?

- This is so helpful to me.
- I am learning so much. I learn new ideas every time I come here.
- I feel like this can really make a difference. I am hopeful about my future.
- When I am here (or interacting), I feel like I am accepted and not judged.
- Everyone should come here. They help in so many different ways.
- The staff here care about my future as much as I do.

How do you want the customer to “feel” about their experience with the services?

- Joyful
- Interested
- Inspired
- Excited
- Hopeful
- Comfortable
- Relaxed
- Accepted
- Safe
- Happy

- What experiences do you want customers to have?
- How do you want customers to feel about your program and services?
- What thoughts do you want to elicit?



## Max Mallow

### Demographics:

- Males
- Age 22
- Lives with mother
- One 6-year-old child

### Background:

- Work experience is under the table, doing odd jobs for family and friends
- Has volunteered at an after-school program
- Left school after 11<sup>th</sup> grade year
- Some interest in the medical field

### Goals:

- Wants his child to have opportunities that he never had
- Would like to earn his diploma to prove to others that he is smart enough to graduate



### Experience in Prior Programs:

- Went to a GED class but didn't complete; it was designed to work independently at home and he didn't have the discipline to work alone

### Challenges

- Has an unreliable car that he shares with her mother
- Feels much stress about finances.
- Has low self-esteem and so gives up easily
- Is currently engaged in a child custody battle with mother of the child
- Has no experience looking for work
- Does not have resume, interview attire, nor interviewing skills

## Shawna Potts



### Demographics:

- Female
- Age 24
- One child, age 3

### Background:

- Unemployed
- Has worked in retail and food service
- Has two non-violent convictions
- High school graduate but reads at 10<sup>th</sup> grade level
- Has serious boyfriend who lives off of her

### Goals:

- Just wants a livable income
- Wants to do better for her child
- Wants to get out of debt and not live hand to mouth
- Wants more of a future than she currently sees

### Experience in Prior Programs:

- Didn't really help her to get a job
- She went to training once but it has been without use
- Has been on TANF before for a year

### Challenges

Doesn't have family support system

Has unreliable cell phone service

Does not have access to internet at home

Has no car, and relies on bus and rides from friends

Is very social and opinionated

Is not a good listener

Isn't happy about her current situation

## Who is Your Customer?

Persona

Name:

Demographics:

Education:

Work History/Work Values

Financial Situation:

Goals:

Challenges:

## Step 2. Identify Touchpoints

**Phone In**

**Website**

**Eligibility screening**

**Orientation**

**Complete online application form**



**Initial meeting with case manager**

**Attend a workshop**

**Ongoing meeting with case manager**

**Post-placement follow-up**

**Get referral to other agency**

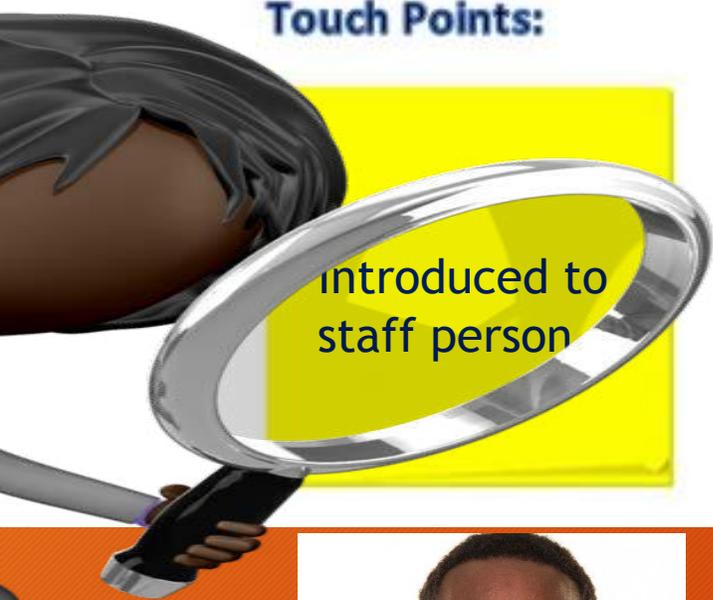
**Complete exit survey**

Brainstorm customer touchpoints – every point at which a customer interacts with your program is a “touchpoint”

# Initial Meeting with Case Manager

## (Very Abbreviated) Customer Journey Map:

### Touch Points:



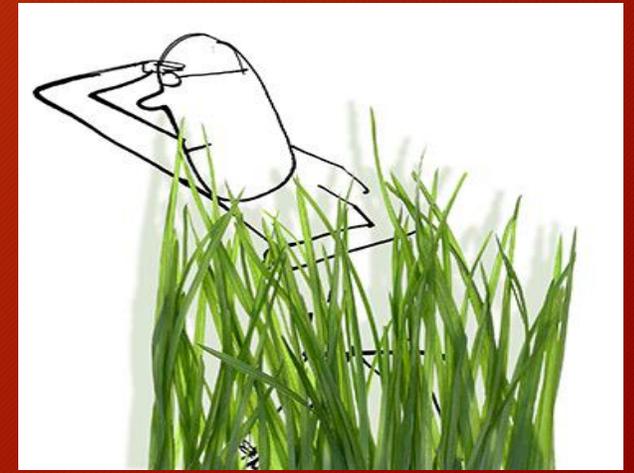
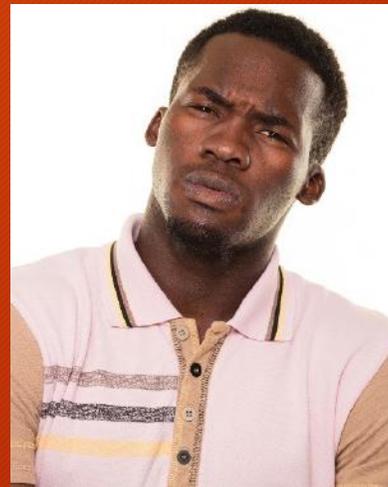
Introduced to  
staff person

Asked me  
background  
information  
about self

Asked me to  
identify  
“barriers”  
about myself.

Given services  
to take care  
of my  
“barriers”

Got an  
individual  
service  
strategy  
paper.



# Your Turn to Try:

Think of an area that the program loses people (between enrolling in the program and beginning training if there is a lag time, after graduation but before a person gets a job, during self-directed placement for those only interested in a job, after a person gets a job, etc.

## **(Very Abbreviated) Customer Journey Map:**

### **Touch Points:**





**Nothing To Keep Them Engaged In Between  
Enrollment and Training Start Date**

Still not skilled enough at job search to get a job so client thinks "What's the Use?"



**Client Gets A Job  
and We Haven't  
Helped them See  
Value in Follow-Up  
Services.**



I got my job.  
Thanks and so  
long.



# On Going Periodic with Case Manager

## (Very Abbreviated) Customer Journey Map:

### Touch Points:

Exchange  
Pleasantries

Update on  
what I have  
done since  
last meeting

Collect  
documents  
from me  
(grades,  
schedule, job  
search log)

Ask me about  
any other  
supportive  
service needs  
that I have.

Talk about  
next steps.

# Your Turn to Try:

Think of an area that the program loses people (between enrolling in the program and beginning training if there is a lag time, after graduation but before a person gets a job, during self-directed placement for those only interested in a job, after a person gets a job, etc.

On your worksheet, outline 5 touchpoints (from the participant's perspective).

## **(Very Abbreviated) Customer Journey Map:**

### **Touch Points:**

A horizontal row of five yellow sticky notes, each with a white border and a slight shadow, intended for writing touchpoints. The notes are arranged in a straight line and are currently blank.

**(Very Abbreviated) Customer Journey Map:**

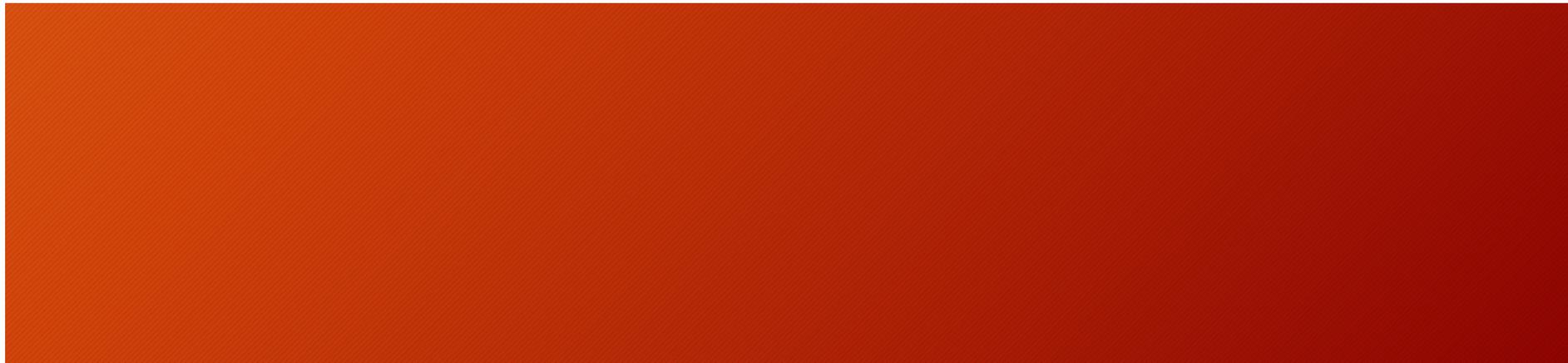
**Touch Points:**



**Thoughts:**



**Back office:**



Next Step: Identify thoughts.

## Initial Meeting with Case Manager

### CUSTOMER JOURNEY MAPPING

(Very Abbreviated) Customer Journey Map:

Touch Points:

Introduced to  
staff person

Asked me  
background  
information  
about self

Asked me to  
identify  
“barriers”  
about myself.

Given services  
to take care  
of my  
“barriers”

Got an  
individual  
service  
strategy  
paper.

Thoughts:

She seems  
nice.

I am not  
sure how  
much I want  
to say here.

This is  
personal.  
Wonder if she  
thinks less of  
me now.

At least they  
are trying to  
help.

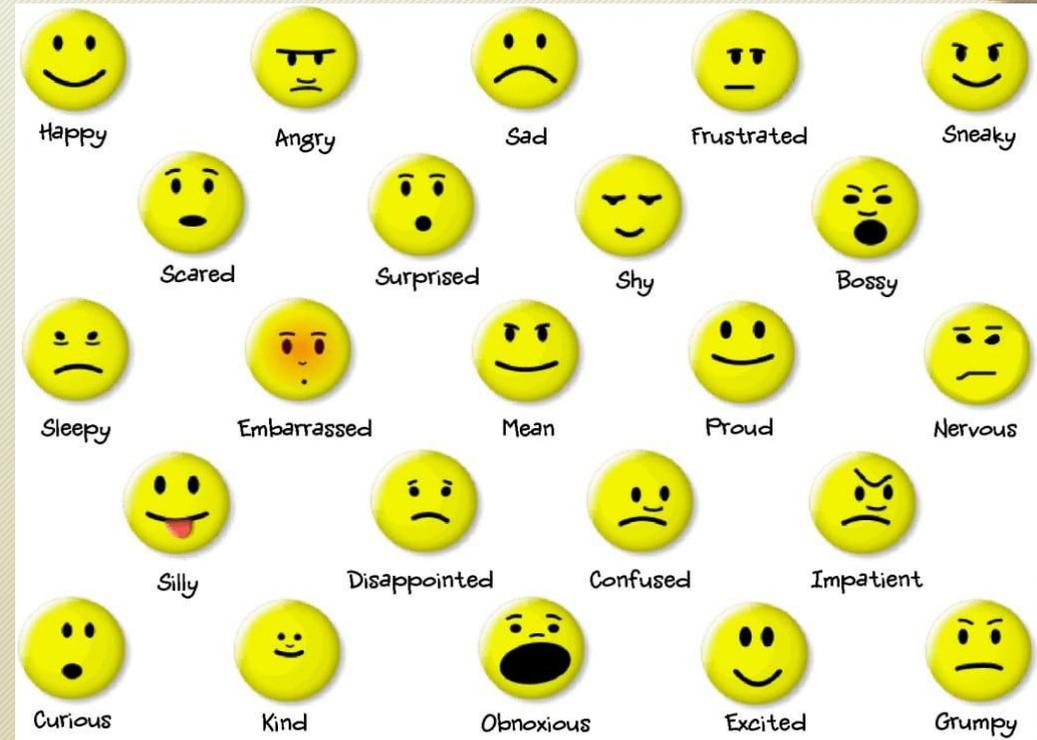
I don't know  
how much I  
agree with all  
of this. I will  
wait and see.



# Identify Emotions

How does the customer feel

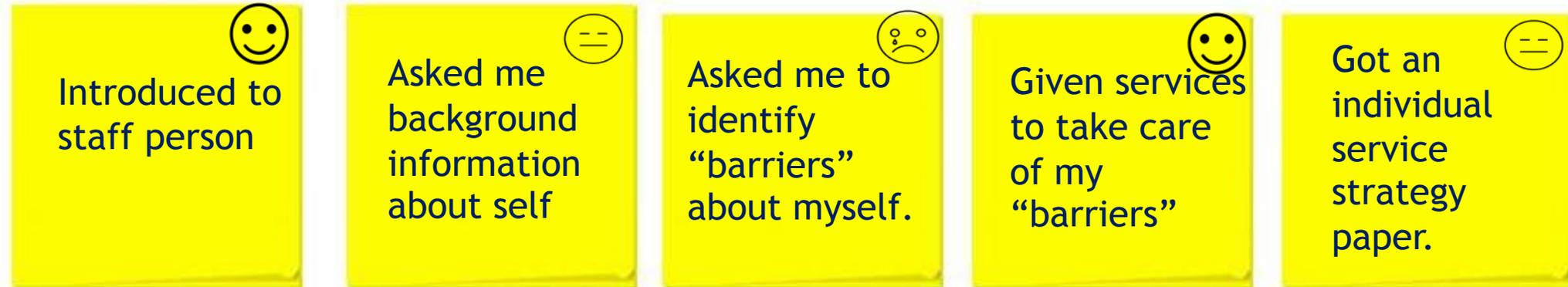
- ▶ Frustrated, happy, sad, neutral, bored, etc.
- ▶ Need to attend to these emotions: these are the moments of truth.
- ▶ This is where you win them over or lose them.



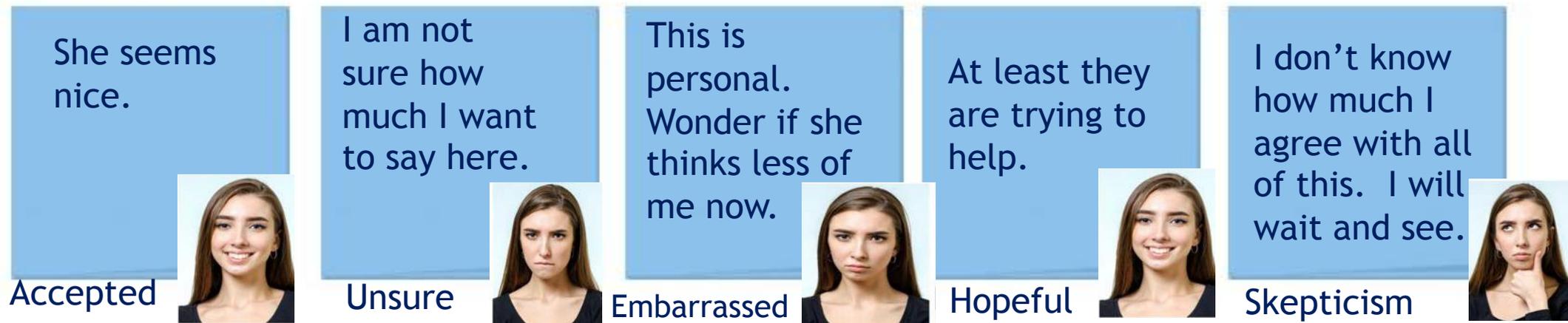
CUSTOMER JOURNEY MAPPING

(Very Abbreviated) Customer Journey Map:

Touch Points:



Thoughts:



**(Very Abbreviated) Customer Journey Map:**

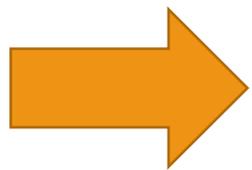
**Touch Points:**



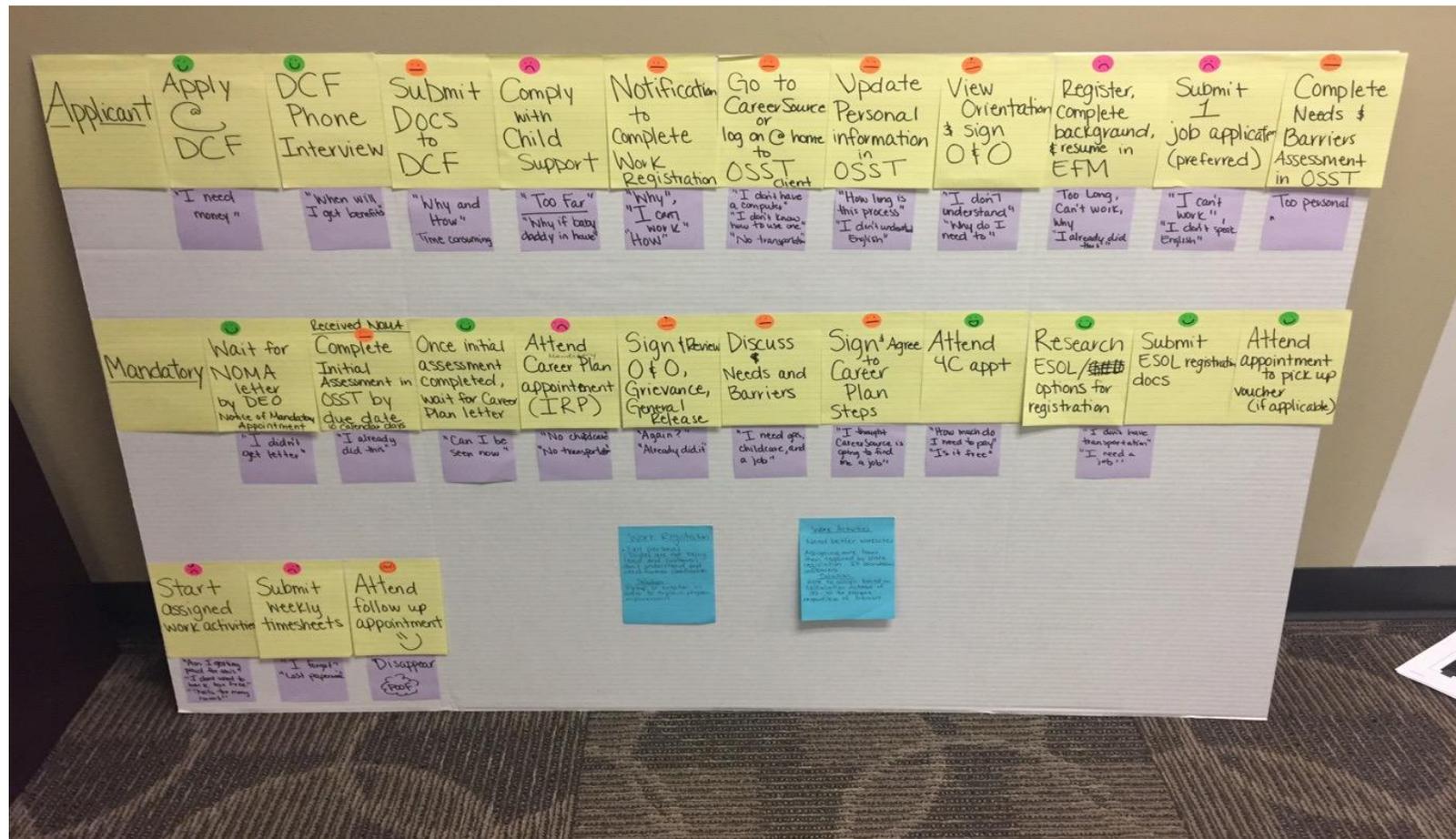
**Thoughts:**



**Emotion:**



# Sample Customer Journey: Work Ready Upfront Services



Compare Participants Thoughts and Emotions to  
What Your Vision of What You Want them to Be.



# Identify and Address Pain Points



Graduate from training class and don't have a job lined up yet.



Do self directed job search

- Did we lose clients because of this step?
- Do clients lose motivation during this step?
- Does this pain point cost us performance and success with the customer?
- What data do we have that demonstrates this is a pain point?

# Setting Priorities



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**You can't fix everything at the same time!**

- **Assess the impact of the pain points on the ability to operate a strong program.**
- **Have each staff person rank all pain points. Rank from most serious to least serious.**
- **Select pain points that get the most votes/highest priorities.**

Graduate from training class (and don't have a job lined up yet or don't get one within a month.)



Do self directed job search (unsuccessfully.)



Got job (doesn't contact career coach to let the program know.)



## Set Priorities

Which pain point is a high priority to fix?

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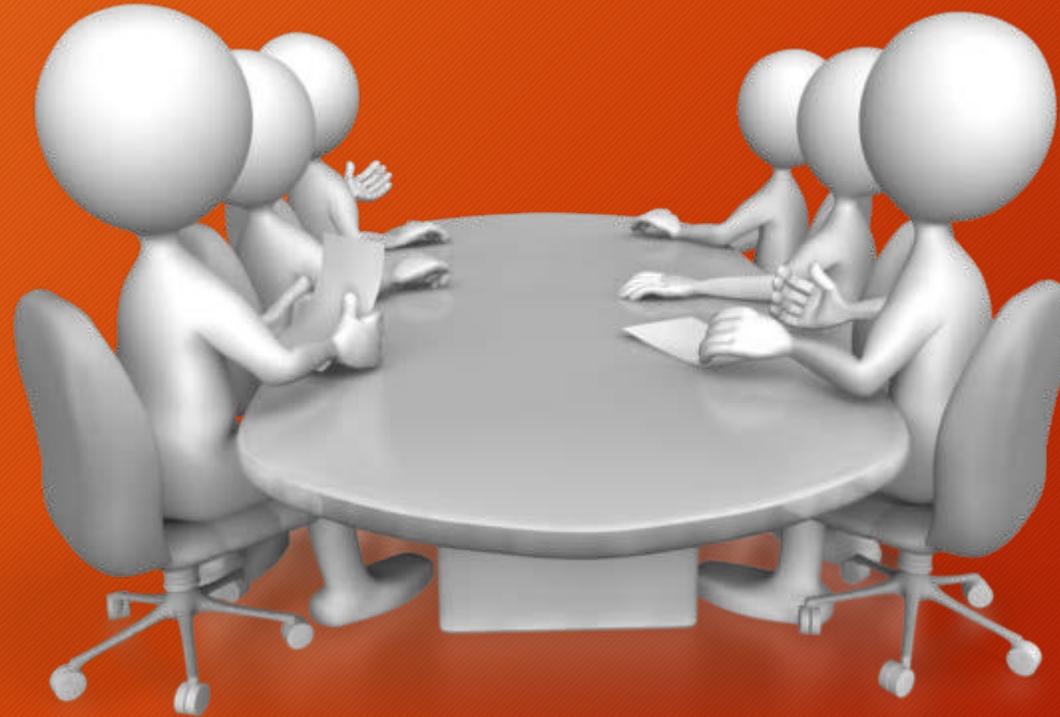
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Select **one**  
pain point

# Developing Solutions

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# Developing Solutions

- Go for Volume (Keep details of ideas to a minimum).
- Withhold judgment (Creativity dies when ideas are criticized as they are born).
- Build on each others' ideas (say “Yes, and” rather than “But” as ideas emerge).
- Find alternatives (Come up with variations on ideas).
- Encourage crazy ideas. (Refrain from censoring).
- Be visual (use flipcharts to map out ideas as they come).



## Develop Solutions

Review customer thoughts, analyze the problems based on the impacts, and brainstorm possible solutions.

<b>Customer Thoughts:</b>	I don't want them getting credit for a job that I got for myself. I got what I wanted - a job. I am done. I don't know why they need to know where I work.
<b>Analysis of the Problem:</b>	Participants don't tell us about when they get a job for a multitude of reasons: they don't know why we need the information, they feel proud that they got the job on their own and don't want us to get credit, we weren't in contact frequently enough during their job search for them to see us as having helped, they see no value in telling us, they don't understand that our success helps other job seekers in the community get training and find jobs,
<b>Solutions:</b>	<b>Use chat or voice to suggestion solutions. All ideas are welcome!</b>

## Participant in job search, gets job and doesn't tell us

### (Very Abbreviated) Customer Journey Map:

#### Touch Points:



### (Very Abbreviated) Customer Journey Map:

#### Touch Points:

#### New Customer Journey Flow



## Experimentation

Which solutions will you move forward with? Create hypothesis statement for each of the concepts that you want to pursue:

**Hypothesis Template:** We believe that **[SOLUTION]** will likely result in **[DESIRED OUTCOME]**. We will know that when **[RESULT/MEASURABLE IMPACT]**.

We believe that... Increasing the frequency and intensity of interaction with the  
case manager during the critical job search period will likely  
result in an increased number of participants notifying us when  
they do get a job. We will know that if rate of notification  
increases over a three-month test period.

# Do our changes increase the likelihood that participants will have the experience that we want them to have?

## What do you want your customer to “think” as they experience your service?

- This is so helpful to me.
- I am learning so much. I learn new ideas every time I come here.
- I feel like this can really make a difference. I am hopeful about my future.
- When I am here (or interacting), I feel like I am accepted and not judged.
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## How do you want the customer to “feel” about their experience with the services?

- Joyful
- Interested
- Inspired
- Excited
- Hopeful
- Comfortable
- Relaxed
- Accepted
- Safe
- Happy

- Do our changes change the participant experience?
- Will this change how the participant feels?
- Does it elicit the thoughts that we are wanting our participants to have?



- What are you taking away from this session?
- What questions/comments do you have?