

JOURNEY MAPPING BEST PRACTICE

WHY:

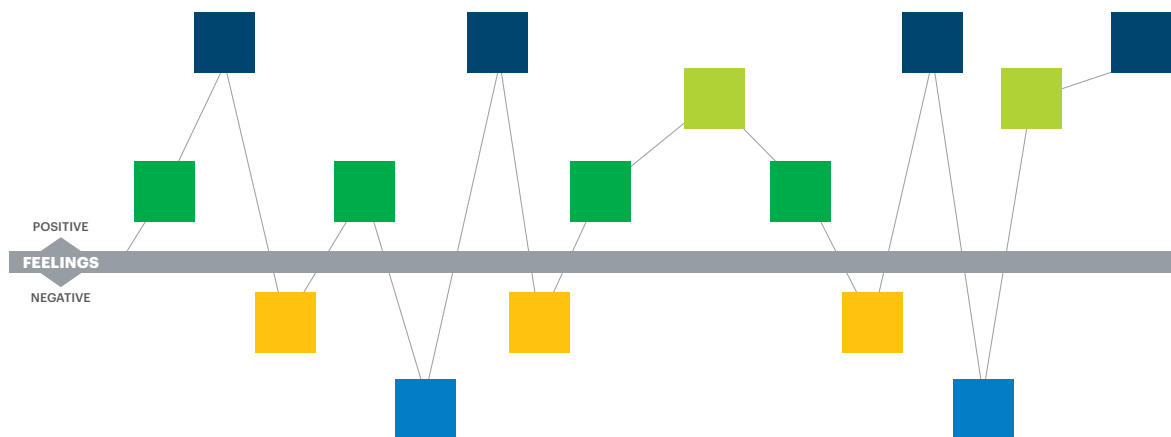
Journey Maps detail the key events and touch points customer experiences while trying to achieve an objective. This process helps us uncover the touch points in a customer's experience that most influence their satisfaction and loyalty. If we're going to improve our customer's experience, we have to understand the customer experience as it is today. We have to walk in the shoes of the people we serve.

When we have that appreciation, we can better adhere to the platinum rule – we can treat our customers as they want to be treated. We can cultivate compassion and we can serve them with integrity.

With a complete journey map, we can then collect feedback from our customers to determine how satisfied they are and the extent to which their satisfaction with a special touch point influences their overall likelihood to recommend.

WHAT:

A Journey Map is a visualization of a customer's interactions with us. It is critical to understand our customers' journeys **from their perspectives—outside in**—rather than process mapping, which is from the inside out.



There are three types of Journey Maps to consider:

1. Customer Relationship Lifecycle:

This is a high level summary of the journeys a customer experiences when they use our products and services. Due to the variety of businesses within UnitedHealth Group there will be some variation in the specifics of the customer life cycle across the company. At a high level there are four main phases:

- Decide/Buy – purchase, enroll, onboard
- Use – submit claims, use an HSA, etc.
- Get Help – call the contact center with an issue, etc.
- Renew – repurchase, re-enroll, etc.

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2. Customer Journeys:

Experiences associated with a single customer objective. Feedback should be captured after the completion of journeys that are known to impact overall loyalty.

3. Touchpoints:

Specific interactions our customers have when they use our products and services that link together to comprise a journey (e.g., receiving a letter).

HOW:

Consider each of the core phases of the customer life cycle:

- Decide/Buy
- Use
- Get Help
- Renew

Select one journey from any of these phases that your line of business is responsible for, and create a high level map for the selected journey from the customer's perspective. For your map, list up to 10 primary stops on your customer's journey. Then create a narrative description of your journey. A complete narrative will answer each of the following questions for each step:

- What is the customer trying to accomplish?
- What does the customer want to know?
- What channel does the customer use to complete this step (i.e., email, phone, web, etc.)?
- How is the customer likely feeling at this step?
- How might we be letting the customer down at this step?

Once you've narrated your entire journey, provide a general assessment of the journey overall. Does it provide a great customer experience? If not, why? And if you wanted to get feedback on this journey, which stops on your customer's journey would you choose to get feedback on (i.e. those parts that have the greatest influence on satisfaction and loyalty) ?

Best practices for executing journey mapping:

- Given the customer-centric nature of journey mapping the best practice for creating journey maps is to facilitate **focus groups** with real customers to understand their perceptions on how they interact with our goods and services. When this approach is not feasible, operational subject matter experts should be leveraged.
- Journey maps should reflect the different channels that our customers use to interact with us throughout the customer lifecycle as well as specific customer journeys.