

# Welcome

- Thank you for joining this workshop: **Using journey maps to improve client experience** hosted by Prosper Canada on behalf of the ABLE Steering Committee.
- The session will begin shortly.

## Technology Details:

For technical assistance during the session, please email [events@prospercanada.org](mailto:events@prospercanada.org)

Participants should connect using VOIP. Please check that the volume is turned up on your computer, and that you have enabled your web-camera and microphone.

If dial in option is required, please check your event invitation under the “Join by phone” details

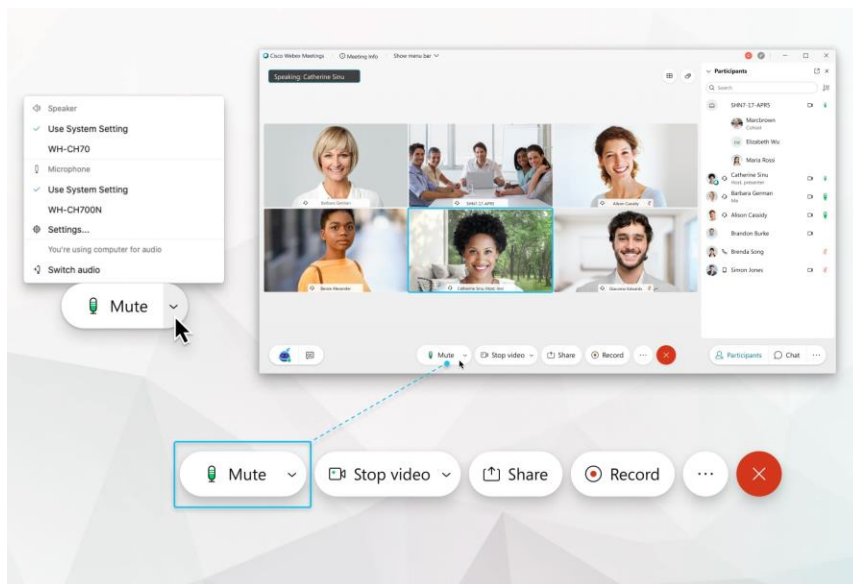
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#2021ABLE

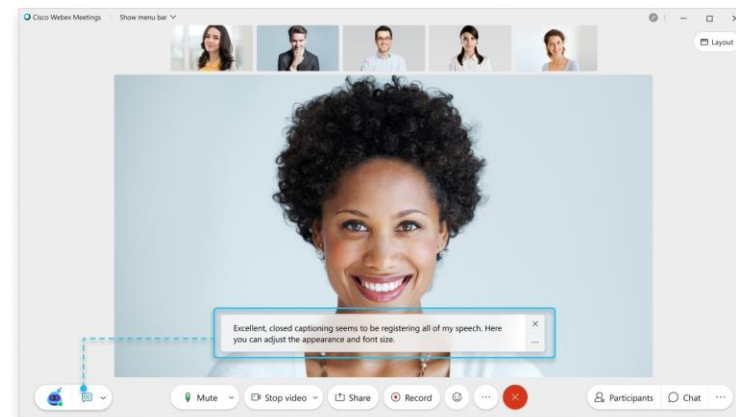


# Session logistics

Please keep your microphone on mute until the sharing portion of today's session.



For closed captioning, please click the “CC” button on the bottom left-hand corner of the meeting platform.





# **Land acknowledgement**

# 2021 ABLE virtual series

## Recover and Rebuild: Helping Canadians build financial security during the pandemic and beyond

The **2021 ABLE Financial Empowerment (FE) virtual series** is a collection of online financial empowerment events designed to provide financial empowerment stakeholders with knowledge, tools, resources and insights on financial topics to help struggling Canadians build financial resilience through the pandemic and recovery.

- **Spring series** – designed for practitioners, interactive
- **Fall series** – designed for all FE stakeholders

**The 2021 ABLE virtual series is hosted by Prosper Canada on behalf of the ABLE Steering Committee.**



Prosper Canada



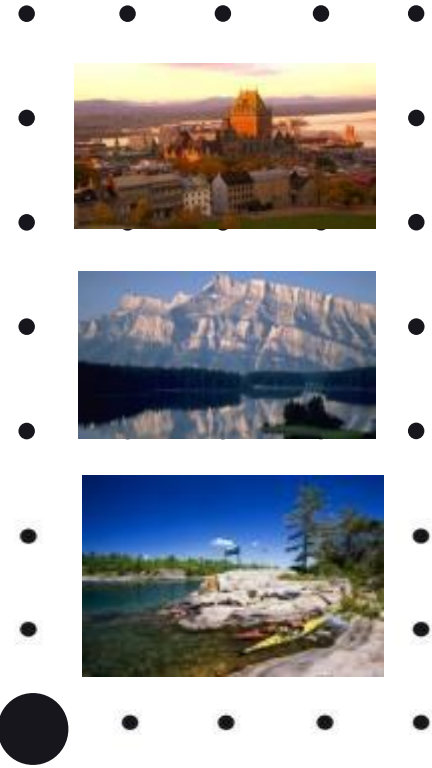
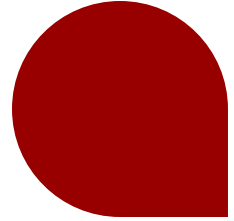
# About us



**ABLE** is a cross-sector community of practice working to reduce poverty through financial empowerment.



**Prosper Canada** is a national charity dedicated to expanding economic opportunity for Canadians living in poverty through program and policy innovation.



# Sponsors

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# Presenters



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Prosper Canada  
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# Agenda

- |    |                    |        |
|----|--------------------|--------|
| 01 | Intros and warm-up | 10 min |
| 02 | Teaching           | 15 min |
| 03 | Practice           | 25 min |
| 04 | Share-back         | 15 min |
| 05 | Wrap-up and Q&A    | 10 min |



# Warm-up



Draw something that reflects your experience getting groceries during the past year

# Learning objectives

- 01 Describe what a journey map is and situations to use one
- 02 Describe the process to develop a journey map for a service
- 03 Describe the components of a journey map
- 04 Apply concepts to a hypothetical service

# What is a journey map?



“Journey maps make intangible experiences visible and facilitate a common understanding between team members”

Stickdown et al., 2018 p. 46

# What is a journey map?

- Human-centered design tool
- Visualizes client experience over time
- Can act as a “boundary object”
- Living document

# When would you use a journey map?

- Identify opportunities for improvement
- Develop a new program or service
- Inform decision making
- Increase empathy

# Reflection

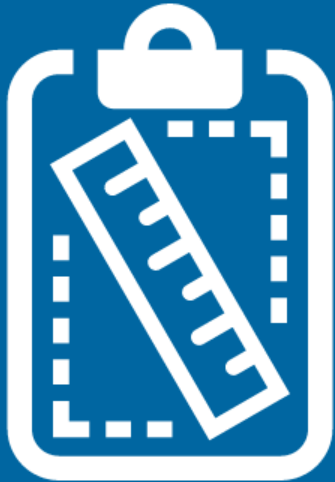


Type in the chat a service/program/project that you think is an opportunity to use a journey map:

**What is the service/program/project?**

What is the **primary goal of the journey map** (e.g., identify pain points, design a new service/program/project, etc.)?

# How to build a journey map



# How to build a journey map

- 01** Identify objective for map
- 02** Gather client data using mixed methods
- 03** Build personas and empathy maps
- 04** Define stages and steps of service



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# How to build a journey map

- 05** List touchpoints and channels
- 06** Chart emotional journeys
- 07** Add quotes or thoughts
- 08** Identify pain points and improvement opportunities

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Can include many other lanes such as storyboards, KPIs, backstage processes etc.

# Example



# Personas



## Marcia

**Marcia (age 34) is a racialized woman and a single mom with two children, Tara (age five) and Ava (age eight). She works part-time at a grocery store and also receives social assistance and other benefits from the Government of Alberta.**

Marcia, Tara, and Ava live in a two-bedroom apartment in Edmonton. Tara and Ava take the school bus to their elementary school and attend extracurricular activities two nights a week.

Marcia visits a local community organization to attend social classes, like cooking and, parenting skills, and received employment support from the organization when she was unemployed. She also visits in March to file her taxes for free through the organization's CVITP clinic.



## Jared

**Jared (age 65) is a senior who is separated from his partner. He retired from his full-time job in the skilled trades because the physical demands were too high and he has health concerns he needs to manage.**

Jared receives seniors' benefits from the Government of Ontario. He never registered for a retirement savings plan.

Jared lives in his home in Ottawa, Ontario and the mortgage is not paid off. In the winter, his utility bills can be as high as \$600/month and he hires help with snow shovelling on his property.

Jared spends time with his family and socializes with friends over breakfast at the local café. In February, Jared goes to a commercial tax preparer to file his taxes.

## Two tax filing journeys

**Marcia**  
goes to  
a CVITP clinic



**Jared**  
goes to  
a commercial  
preparer



TOUCH-POINTS

THOUGHTS

EMOTIONS

TOUCH-POINTS

THOUGHTS

Wait for and  
gather documents

**Online** CRA, receipts, slips  
**Mail** slips, receipts  
**In-person visits** employer, professional offices,  
government agencies, library for internet  
**Phone** CRA, government agencies,  
community organizations

"It's too complicated. Getting  
everything organized and  
making sure that you don't  
lose anything is tiring."



CONFIDENT



HAPPY



FRUSTRATED

**Mail** slips, receipts  
**In-person visits** professional offices,  
government agencies  
**Phone** CRA, government agencies,  
community organizations

"I have a tendency of misplacing  
things, so trying to make sure  
I put them in the same spot and  
they're all together is difficult."

Set up appointment  
to file

**Phone**  
Community organization calls to book

"The organization called to  
remind me and schedule a date.  
I didn't have to wait. They told  
me what to bring."



CONFIDENT



HAPPY

**Phone**  
Call commercial preparer

"The location close to me was  
able to fit me in right away."

Wait to file at  
tax preparer

**In-person**  
CVITP clinic

"It's a hassle because  
I have my daughters  
with me every time  
I file my taxes."



HAPPY



FRUSTRATED

**In-person**  
commercial preparer

"I didn't have to wait,  
I got in quite quickly  
as scheduled."

File  
taxes

**In-person**  
CVITP clinic

"They were very friendly  
and explained everything.  
Afterwards he told me about  
all the free stuff that I could  
get in my community."



GOOD



CONFUSED AND ANNOYED

**In-person**  
commercial preparer

"I thought I would get a hard copy  
of the slips, but then I realized no,  
that was a couple years ago, now  
you have to go online and print it."

Receive notice  
of assessment

**Online**  
CRA website

"I had no issues with filing.  
I got the paper back in the  
mail showing what I am  
going to get for the full year."



RELIEVED



ANGRY

**Mail**  
CRA

"I wasn't happy that they didn't  
ask details about my home,  
which means I won't get grants  
on time this year."

Deal with  
outcome

No touchpoint

"Everything was fine.  
I will get my benefits."



RELIEVED



UPSET BUT RELIEVED

**Phone**  
Set up appointment with  
commercial preparer  
**In-person**  
commercial preparer

"It was their fault that  
information was missing and so  
I had to go back in. But at least  
they helped me resolve it."

# Practice

Let's imagine we operate a grocery store and want to provide our customers with the most seamless shopping experience that meets their specific needs during the pandemic

**Work in groups to create a mini journey map**

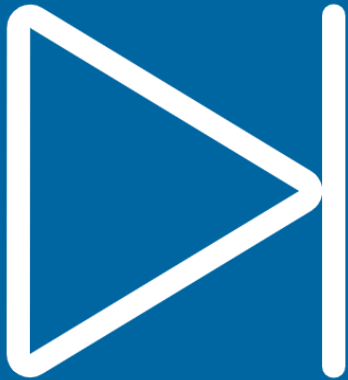
- 01** Join the Mural (link in breakout chat)
- 02** Introduce yourself to your group
- 03** Work through the directions in your breakout room's area of the Mural.

# Share-back



- 01** How was the process for you/your group?
- 02** What did you learn?
- 03** What was challenging?
- 04** Which rows were easiest/hardest?

# Closing thoughts



- 01** Journey maps are human-centered tools that help uncover client experience with a service and identify pain points and opportunities for improvement.
- 02** Visualizing experiences allow teams to empathize with clients and understand the context.
- 03** You don't need a special degree or training to complete a journey map.

# Q&A



# Resources

Stickdown M, Lawrence A, Hormess M, Schneider J. *This Is Service Design Doing: Applying Service Design Thinking in the Real World - A Practitioner's Handbook*. O'Reilly Media, Inc.; 2018.

IDEO. Design Kit. <https://www.designkit.org/>

Prosper Canada. Service design. <https://prospercanada.org/Our-Work/Our-service-design-work.aspx>

ESDC-Centre of Expertise for Accessible Client Service. Accessible Client Service: Journey map templates for programs and services. <https://ceacs-cesca.github.io/playbook/tools/>

(Download Word document in "Inspiring Tools" and pp. 48, 49 of main PDF)

Center for Advanced Hindsight. Introducing the Behavioral Mapping Case Study & Cheat Sheet. <https://advanced-hindsight.com/blog/introducing-the-behavioral-mapping-case-study-cheat-sheet/>

# Example journey maps

[Tax time insights](#) (p. 23)

[Virtual self-file model overview](#)

Remote financial help:

- [FSGV \(Vancouver\)](#)
- [Manitoba \(SEED Winnipeg\)](#)
- [Thunder Bay \(Thunder Bay Counseling\)](#)

[Stakeholder Journey Mapping: An Educational Tool for Social Entrepreneurs](#) (p. 8)

[Black Mamas Community Collective](#)

[Kate Wren journey mapping workshop for the Mississauga Halton Community Care Access Centre](#)



# Reflection



**Did what you learn today change which service/program/project you would choose?**

**What is one thing you would need to understand more/better before embarking? How will you go about getting that information?**

# Thank you for joining us

Today's event is part of the **2021 ABLE virtual series**. This is the final event in the Spring Series.

The Fall Series will return in October/November of 2021. Please visit [ablefinancialempowerment.org](https://ablefinancialempowerment.org) to stay up to date on future events.



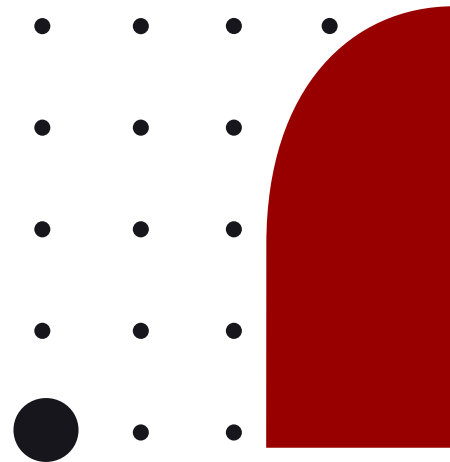
# What's next

**We will be sending you an email soon with:**

- Slides and handout from today's webinar
- Link to Post-Series survey

**We will also post all materials in our ABLÉ event page:**

<https://ablefinancialempowerment.org/able-conference/2021-able-conference/>



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