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.

The journey mapping tool represents a generic, program-agnostic view of the client journey. The key elements stem from a combination of a detailed map and an experience map, providing input into a high-level frame. It is designed to assess accessible client service across multiple policy and service improvement initiatives.

# Methodology

## **Step 1**: Understand Client Reality

You must summarize the symptoms related to functional limitations and emotional behaviours in relation to each channel.

## **Step 2**: Track Client Interaction

You need to describe the experience using all six phases of the client journey. This will capture a high-level understanding of your department, agency or organization’s 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.

## **Step 3**: Improve Client Experience

You need to assess client needs within each channel (current state) and map them against the capabilities needed (future state) to provide barrier-free accessible client service.

# **Current State** Client Journey Map Template

## **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 client service channel used or prefered (online, phone, in-person, etc.) | What prevents the client from getting the information | Identify 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 client service channel used or prefered (online, phone, in-person, etc.) | 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 client service channel used or prefered (online, phone, in-person, etc.) | 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 client service channel used or prefered (online, phone, in-person, etc.) | 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 client service channel used or prefered (online, phone, in-person, etc.) | 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 client service channel used or prefered (online, phone, in-person, etc.) | What prevents the client from  tracking and following up | Identify client satisfaction (emotions/feelings) |

# **Future State** Client Journey Map Template

## **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. |