Using alignment diagrams to better understand your customers and achieve stakeholder alignment

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UNIVERSITY OF
TORONTO

(Thanks to Chip Heath & Dan Heath for the slide template)

Who am I?

User Experience (UX) Designer
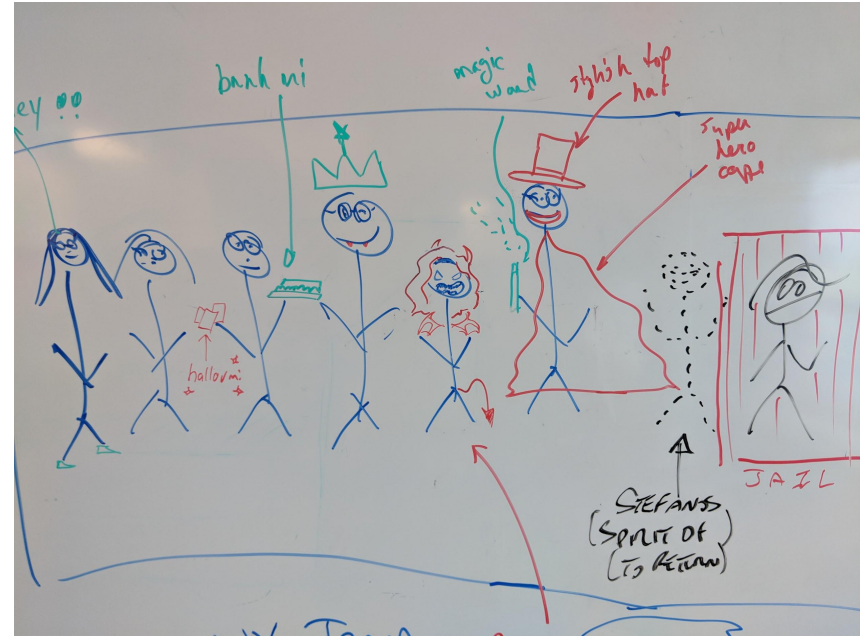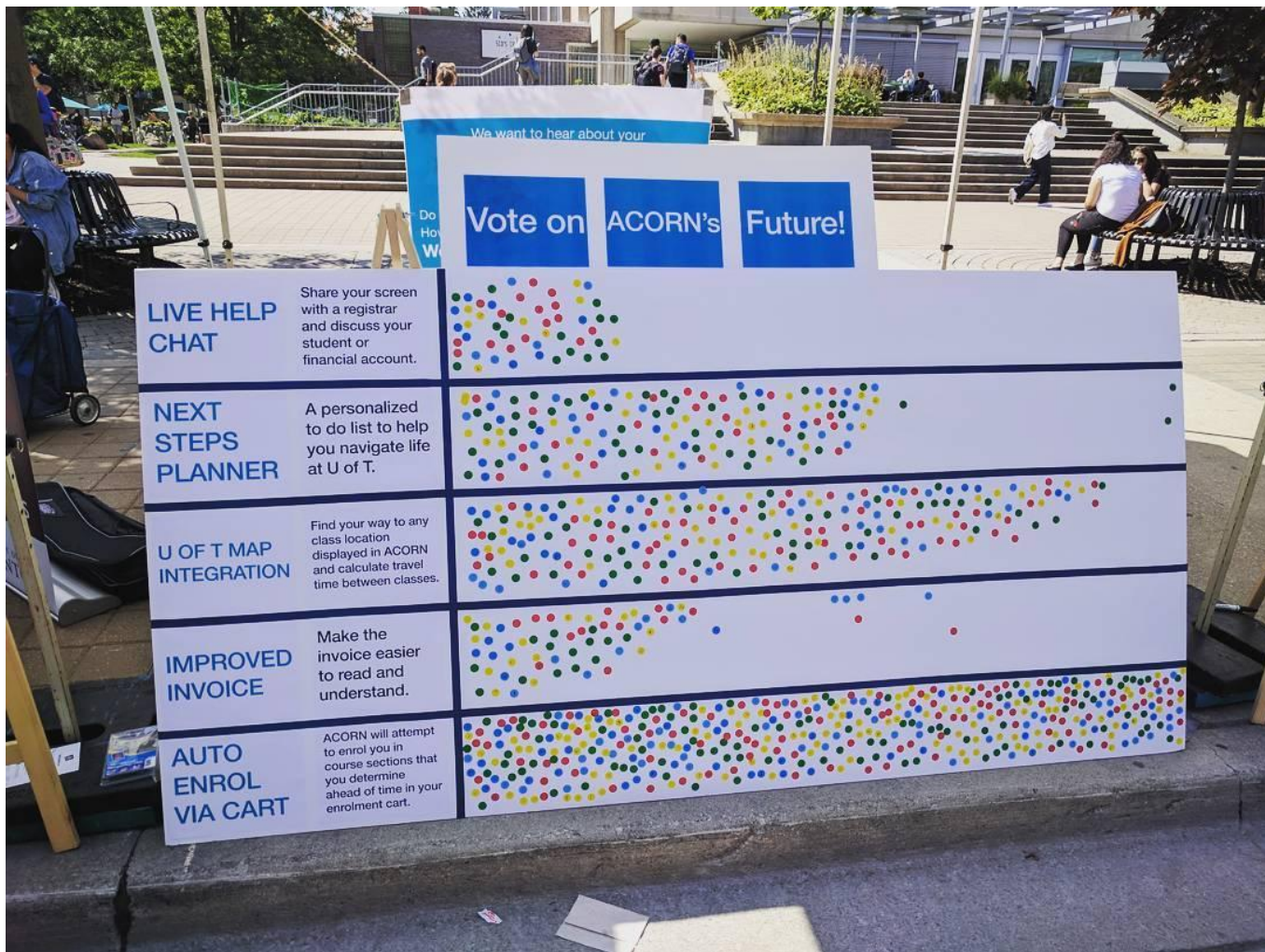
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Who we are

User experience and process improvement team

Design for some of the most widely-used student-, staff- and faculty-facing software

Design goes hand in hand with re-imagining business process.

User-centred Design (UCD) process

Vote on ACORN's Future!

LIVE HELP CHAT	Share your screen with a registrar and discuss your student or financial account.
NEXT STEPS PLANNER	A personalized to do list to help you navigate life at U of T.
U OF T MAP INTEGRATION	Find your way to any class location displayed in ACORN and calculate travel time between classes.
IMPROVED INVOICE	Make the invoice easier to read and understand.
AUTO ENROL VIA CART	ACORN will attempt to enrol you in course sections that you determine ahead of time in your enrolment cart.

We want to hear about your

Who we are

EASI

Enterprise Applications & Solution Integration

NGSIS

Next Generation Student Information Systems

Today's Talk

- What is an alignment diagram?

- Why are they a thing?

- Anatomy of an alignment diagram

- Examples 🗆

- Case Study: Diagram for **Student and Campus Community Development**

Alignment Diagrams

Any map, diagram or visualization that reveals **both sides of value creation** in a single overview. It is a category of diagram that illustrates the interaction between people and organizations.

J. Kalbach, "Experience Mapping"

Why Alignment Diagrams?

Alignment

Misalignment impacts the entire enterprise: teams lack a common purpose, solutions are built that are detached from reality, there is a focus on technology rather than experience, and strategy is shortsighted.

J. Kalbach, "Experience Mapping"

Anatomy of an Alignment Diagram

| Stage 1 | Stage 2 | Stage 3 | Stage 4 |

| Discovery | Onboarding | Use | Advocacy |

Stage 1

Stage 2

Stage 3

Stage 4

| Stage 1 | Stage 2 | Stage 3 | Stage 4 |

Touchpoints & Actions

| Stage 1 | Stage 2 | Stage 3 | Stage 4 |

Customer's State and Concerns

Touchpoints & Actions

Stage 1	Stage 2	Stage 3	Stage 4

Customer's State and Concerns

Touchpoints & Actions

Organization's Operations, Strategy & Concerns

Stage 1	Stage 2	Stage 3	Stage 4

State of Mind

Pain Points

Moments of Truth

Touchpoints & Actions

Organization's Operations, Strategy & Concerns
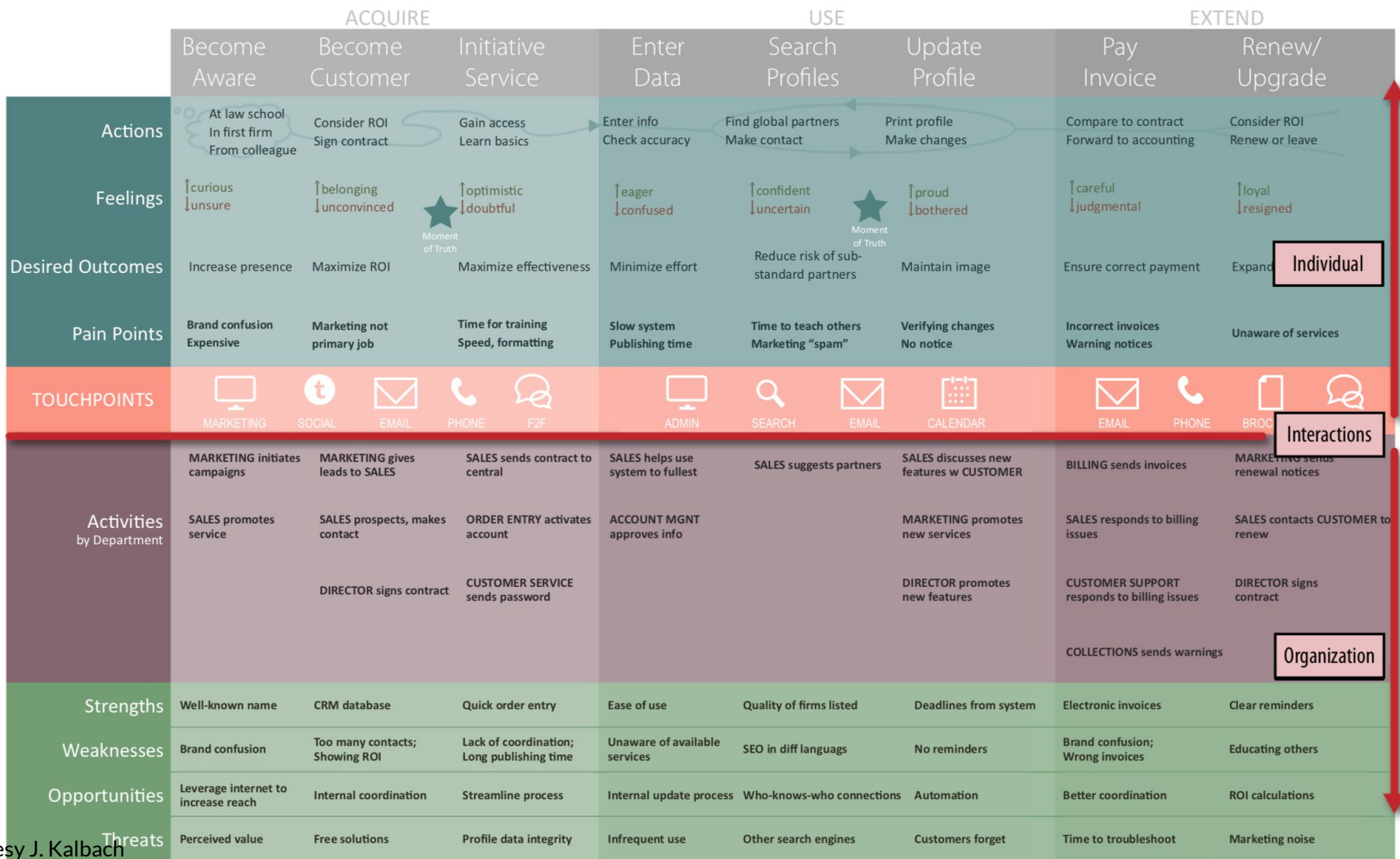
Stage 1	Stage 2	Stage 3	Stage 4

State of Mind

Pain Points

Moments of Truth

Touchpoints & Actions

Internal Systems

SWOT, Organization Vision

Examples

Experience map organized into three phases — ACQUIRE, USE, EXTEND — across eight stages.

	ACQUIRE			USE			EXTEND	
	Become Aware	Become Customer	Initiative Service	Enter Data	Search Profiles	Update Profile	Pay Invoice	Renew/ Upgrade
Actions	At law school / In first firm / From colleague	Consider ROI / Sign contract	Gain access / Learn basics	Enter info / Check accuracy	Find global partners / Make contact	Print profile / Make changes	Compare to contract / Forward to accounting	Consider ROI / Renew or leave
Feelings	↑curious ↓unsure	↑belonging ↓unconvinced	↑optimistic ↓doubtful ★ Moment of Truth	↑eager ↓confused	↑confident ↓uncertain	↑proud ↓bothered ★ Moment of Truth	↑careful ↓judgmental	↑loyal ↓resigned
Desired Outcomes	Increase presence	Maximize ROI	Maximize effectiveness	Minimize effort	Reduce risk of sub-standard partners	Maintain image	Ensure correct payment	Expand [Individual]
Pain Points	Brand confusion / Expensive	Marketing not primary job	Time for training / Speed, formatting	Slow system / Publishing time	Time to teach others / Marketing "spam"	Verifying changes / No notice	Incorrect invoices / Warning notices	Unaware of services

TOUCHPOINTS / Interactions

ACQUIRE	USE	EXTEND
MARKETING · SOCIAL · EMAIL · PHONE · F2F	ADMIN · SEARCH · EMAIL · CALENDAR	EMAIL · PHONE · BROC... · (chat)

Activities by Department								
	MARKETING initiates campaigns	MARKETING gives leads to SALES	SALES sends contract to central	SALES helps use system to fullest	SALES suggests partners	SALES discusses new features w CUSTOMER	BILLING sends invoices	MARKETING sends renewal notices
	SALES promotes service	SALES prospects, makes contact	ORDER ENTRY activates account	ACCOUNT MGNT approves info		MARKETING promotes new services	SALES responds to billing issues	SALES contacts CUSTOMER to renew
		DIRECTOR signs contract	CUSTOMER SERVICE sends password			DIRECTOR promotes new features	CUSTOMER SUPPORT responds to billing issues	DIRECTOR signs contract
							COLLECTIONS sends warnings [Organization]	

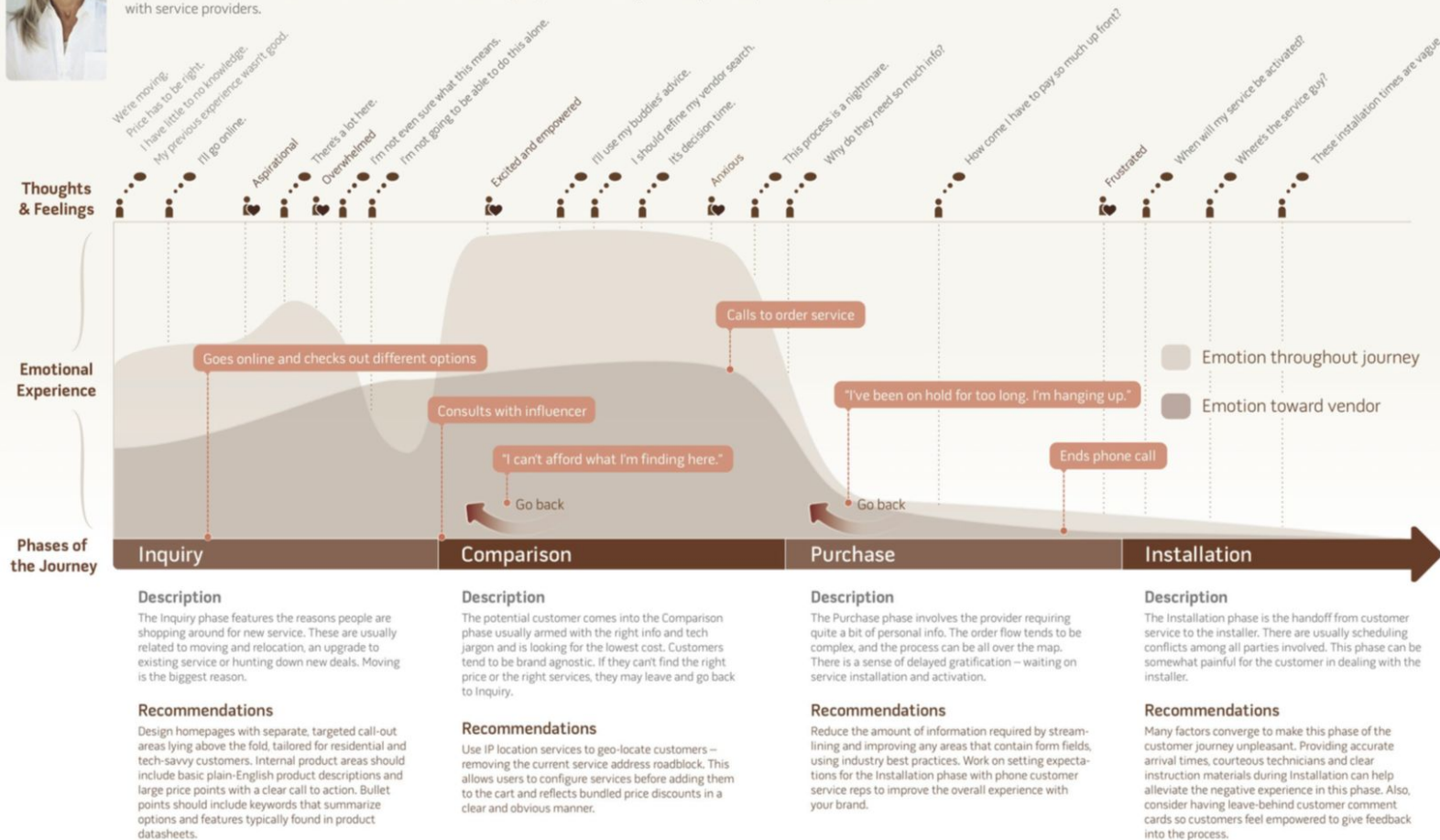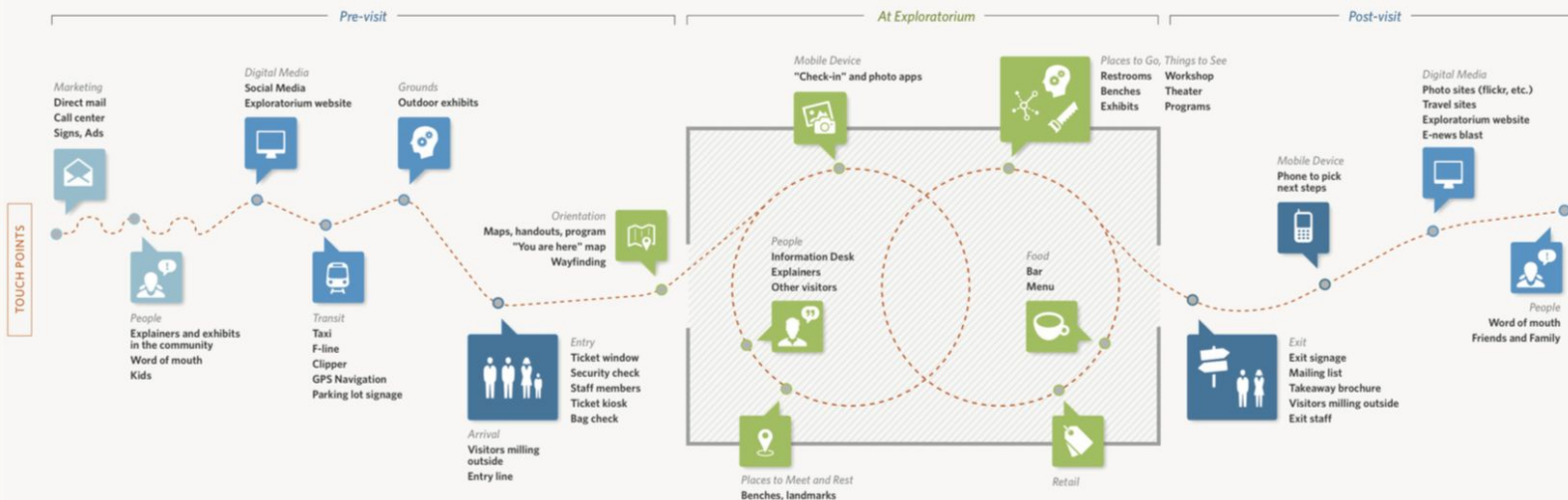|	Become Aware	Become Customer	Initiative Service	Enter Data	Search Profiles	Update Profile	Pay Invoice	Renew/ Upgrade
Strengths	Well-known name	CRM database	Quick order entry	Ease of use	Quality of firms listed	Deadlines from system	Electronic invoices	Clear reminders
Weaknesses	Brand confusion	Too many contacts; Showing ROI	Lack of coordination; Long publishing time	Unaware of available services	SEO in diff languags	No reminders	Brand confusion; Wrong invoices	Educating others
Opportunities	Leverage internet to increase reach	Internal coordination	Streamline process	Internal update process	Who-knows-who connections	Automation	Better coordination	ROI calculations
Threats	Perceived value	Free solutions	Profile data integrity	Infrequent use	Other search engines	Customers forget	Time to troubleshoot	Marketing noise

Courtesy J. Kalbach

Sarah's Broadband Provider Journey

effective UI

Sarah is moving her family of three. She knows she's going to need phone and Internet service. The effective and contextual factors that will affect Sarah's choice in broadband vendors are price, and her existing knowledge of and previous experience with service providers.
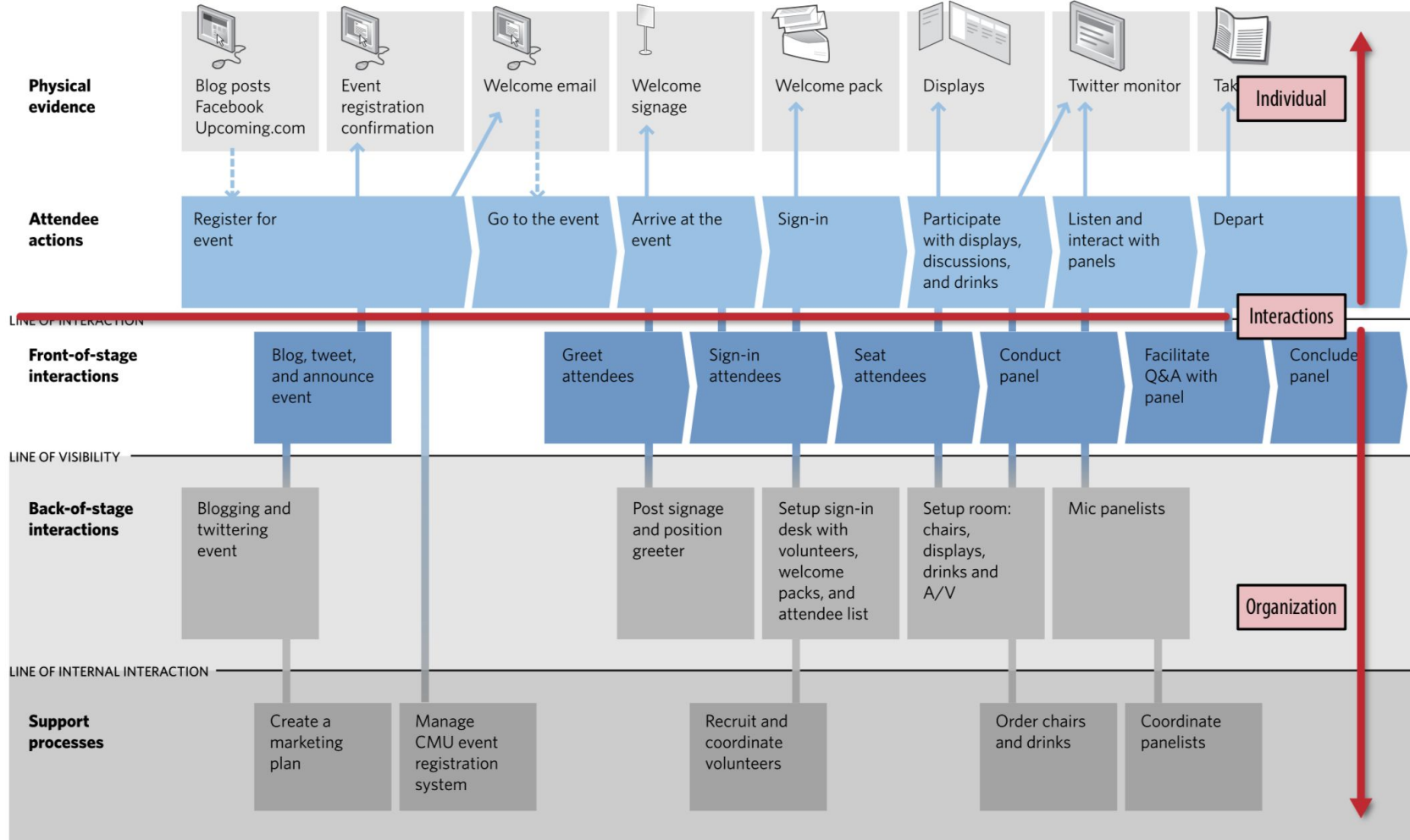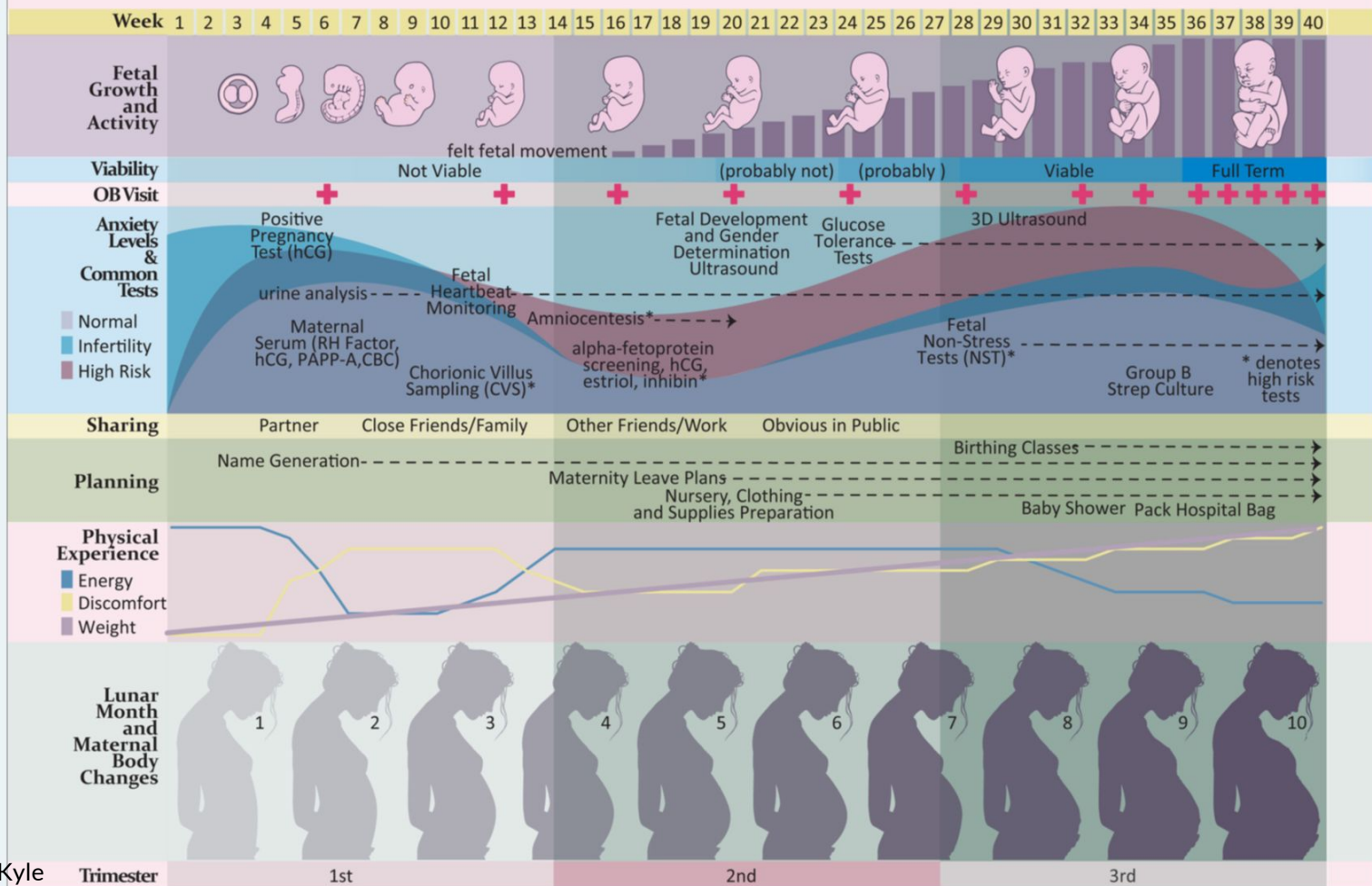
Thoughts & Feelings

We're moving.
Price has to be right.
I have little to no knowledge.
My previous experience wasn't good.
I'll go online.
Aspirational
There's a lot here.
Overwhelmed
I'm not even sure what this means.
I'm not going to be able to do this alone.
Excited and empowered
I'll use my buddies' advice.
I should refine my vendor search.
It's decision time.
Anxious
This process is a nightmare.
Why do they need so much info?
How come I have to pay so much up front?
Frustrated
When will my service be activated?
Where's the service guy?
These installation times are vague.

Emotional Experience

- Goes online and checks out different options
- Consults with influencer
- "I can't afford what I'm finding here."
- Go back
- Calls to order service
- "I've been on hold for too long. I'm hanging up."
- Ends phone call
- Go back

Emotion throughout journey
Emotion toward vendor

Phases of the Journey

Inquiry

Description
The Inquiry phase features the reasons people are shopping around for new service. These are usually related to moving and relocation, an upgrade to existing service or hunting down new deals. Moving is the biggest reason.

Recommendations
Design homepages with separate, targeted call-out areas lying above the fold, tailored for residential and tech-savvy customers. Internal product areas should include basic plain-English product descriptions and large price points with a clear call to action. Bullet points should include keywords that summarize options and features typically found in product datasheets.

Comparison

Description
The potential customer comes into the Comparison phase usually armed with the right info and tech jargon and is looking for the lowest cost. Customers tend to be brand agnostic. If they can't find the right price or the right services, they may leave and go back to Inquiry.

Recommendations
Use IP location services to geo-locate customers — removing the current service address roadblock. This allows users to configure services before adding them to the cart and reflects bundled price discounts in a clear and obvious manner.

Purchase

Description
The Purchase phase involves the provider requiring quite a bit of personal info. The order flow tends to be complex, and the process can be all over the map. There is a sense of delayed gratification — waiting on service installation and activation.

Recommendations
Reduce the amount of information required by stream-lining and improving any areas that contain form fields, using industry best practices. Work on setting expecta-tions for the Installation phase with phone customer service reps to improve the overall experience with your brand.

Installation

Description
The Installation phase is the handoff from customer service to the installer. There are usually scheduling conflicts among all parties involved. This phase can be somewhat painful for the customer in dealing with the installer.

Recommendations
Many factors converge to make this phase of the customer journey unpleasant. Providing accurate arrival times, courteous technicians and clear instruction materials during Installation can help alleviate the negative experience in this phase. Also, consider having leave-behind customer comment cards so customers feel empowered to give feedback into the process.

Exploratorium Visitor Experience Map
Where are you supporting their needs and actions?

explOratorium®

map by adaptive path

Pre-visit **At Exploratorium** **Post-visit**

TOUCH POINTS

Marketing
Direct mail
Call center
Signs, Ads

Digital Media
Social Media
Exploratorium website

Grounds
Outdoor exhibits

Mobile Device
"Check-in" and photo apps

Places to Go, Things to See
Restrooms
Benches
Exhibits

Workshop
Theater
Programs

Digital Media
Photo sites (flickr, etc.)
Travel sites
Exploratorium website
E-news blast

People
Explainers and exhibits in the community
Word of mouth
Kids

Transit
Taxi
F-line
Clipper
GPS Navigation
Parking lot signage

Orientation
Maps, handouts, program
"You are here" map
Wayfinding

People
Information Desk
Explainers
Other visitors

Food
Bar
Menu

Mobile Device
Phone to pick next steps

People
Word of mouth
Friends and Family

Entry
Ticket window
Security check
Staff members
Ticket kiosk
Bag check

Exit
Exit signage
Mailing list
Takeaway brochure
Visitors milling outside
Exit staff

Arrival
Visitors milling outside
Entry line

Places to Meet and Rest
Benches, landmarks

Retail

ACTIONS

GET THE IDEA	PLAN THE DAY	GET INSIDE	DO THE MUSEUM		WHAT'S NEXT	RETURN TO LIFE
• See something cool on social media • See crowds outside • Hear about in news media • Learn via word of mouth	• Understand the options • Buy tickets online • Print ticket • Group local activities	• Wait in lines • Digest ticketing options • Collect materials • Check bags • Use bathrooms • Gather group	• Pick an exhibit • Become engaged • Stay together • Tinker • Watch programs • Look for resting place	• Seek help • Snack • Try on clothes • Look for value	• Consider membership • Leave • Get bags • Judge experience • Re-orient upon exit • Find car • Have dinner nearby	• Look and upload photos • Seek more information about exhibits • Learn more about a topic • Share what I learned • Write review • Notice Exploratorium branding in the city

QUESTIONS

GET THE IDEA	PLAN THE DAY	GET INSIDE	DO THE MUSEUM		WHAT'S NEXT	RETURN TO LIFE
• How do I find what I need to know? • What do we do once we're there? • Are my kids too young? • Is this stuff for adults? • How much time will it take?	• Where is it? • How do I get there? • What should I bring? • Where do I park?	• Where do I get tickets? • Why did the line stop? • Is it worth becoming a member now? • What should I see? • Where can I put my stuff? • Where is our meeting spot?	• Where are the bathrooms? • Where is [a specific exhibit]? • Is everyone together? • Why can't I find a staff person? • What else should I see?	• What's cheap in the store? • What did I miss?	• What did you think? • How do I get out of here? • Do we have all our stuff? • What are upcoming events? • Where is my car? • How do I remember this?	• What else can I do? • Where can I find more information about that thing? • How do I tell others what I did?

Physical evidence

| Blog posts Facebook Upcoming.com | Event registration confirmation | Welcome email | Welcome signage | Welcome pack | Displays | Twitter monitor | Tak... |

Individual

Attendee actions

Register for event · Go to the event · Arrive at the event · Sign-in · Participate with displays, discussions, and drinks · Listen and interact with panels · Depart

LINE OF INTERACTION

Interactions

Front-of-stage interactions

Blog, tweet, and announce event · Greet attendees · Sign-in attendees · Seat attendees · Conduct panel · Facilitate Q&A with panel · Conclude panel

LINE OF VISIBILITY

Back-of-stage interactions

Blogging and twittering event · Post signage and position greeter · Setup sign-in desk with volunteers, welcome packs, and attendee list · Setup room: chairs, displays, drinks and A/V · Mic panelists

Organization

LINE OF INTERNAL INTERACTION

Support processes

Create a marketing plan · Manage CMU event registration system · Recruit and coordinate volunteers · Order chairs and drinks · Coordinate panelists

Brandon Schauer, Adaptive Path
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Pregnancy Experience Map

| Week | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 |

Fetal Growth and Activity

felt fetal movement

Viability

Not Viable — (probably not) — (probably) — Viable — Full Term

OB Visit

Anxiety Levels & Common Tests

- Normal
- Infertility
- High Risk

Positive Pregnancy Test (hCG)

urine analysis

Maternal Serum (RH Factor, hCG, PAPP-A, CBC)

Chorionic Villus Sampling (CVS)*

Fetal Heartbeat Monitoring

Amniocentesis*

alpha-fetoprotein screening, hCG, estriol, inhibin*

Fetal Development and Gender Determination Ultrasound

Glucose Tolerance Tests

3D Ultrasound

Fetal Non-Stress Tests (NST)*

Group B Strep Culture

* denotes high risk tests

Sharing

Partner — Close Friends/Family — Other Friends/Work — Obvious in Public

Planning

Name Generation-

Maternity Leave Plans

Nursery, Clothing and Supplies Preparation

Birthing Classes

Baby Shower   Pack Hospital Bag

Physical Experience

- Energy
- Discomfort
- Weight

Lunar Month and Maternal Body Changes

1   2   3   4   5   6   7   8   9   10

Trimester

1st — 2nd — 3rd

Courtesy Beth Kyle

Exotica

OUTSIDE ACTIVITIES

INSIDE ACTIVITIES

Determine what you can afford
- Get real estate appraisal of old home
- Apply for a mortgage pre-approval
- Negotiate with lenders

BANKS

PROPERTY RECORDS

BUYER'S AGENT

ONLINE SERVICES

Find new home
- Seek property information (year of construction, sales history, market value etc.)
- Search home listings
- Visit open homes

ONLINE MAPS AND PUBLIC TRANSPORT SCHEDULES

ONLINE LISTINGS

LOCAL NEWS PAPERS

Select neighborhood(s)
- Check proximity to work / commute times
- Evaluate available services: nearest bank / ATM, bar, coffeeshop, supermarket, public transport, school, kindergarden etc.
- Check proximity to social network
- Inquire crime statistics / neighborhood reputation

HOME LISTINGS
MORTGAGE CALCULATORS
ONLINE APPLICATIONS FOR MORTGAGES
PRICE STATISTICS

BUYER'S AGENT

ONLINE MAPS AND DATABASES

RECOMMENDATIONS FROM SOCIAL NETWORK

FAMILY AND FRIENDS

SOCIAL MEDIA

ONLINE SEARCH

Buy new home
- Sign deed
- Bidding and negotiations
- Hire a home inspector
- Sign mortgage note

LAWYER / REAL ESTATE AGENT

Sell old home
- Hire a real estate agent
- Prepare / stage home for having an open home
- Sign contract with buyer

Decide to move

Move
- Sign contract with power and water supplier
- Pack and unpack
- Decorate, repair, alter
- Transport belongings
- Report change of address to postal services, banks, federal and state agencies etc.

CARPENTERS, PLUMBERS, ELECTRICIANS ETC. INTERIOR DESIGNERS ETC.

WEBSITES OF AMERICAN SOCIETY OF HOME INSPECTORS OR THE NATIONAL ASSOCIATION OF HOME INSPECTORS

RECOMMENDATIONS FROM SOCIAL NETWORK AND BUYER'S AGENT

MOVERS / CAR RENTAL

ONLINE FORMS

PHONE

Courtesy Sofia Hussain

Booking.com

A COMPREHENSIVE MAP OF THE
GUEST EXPERIENCE

- Points of satisfaction
- Points of dissatisfaction
- Points of both satisfaction and dissatisfaction
- Points of Delight

Size of circle = Frequency of mentions

Delight Point #4: Good Location + Adventure = A Memorable Experience
Hotels that help guests to take full advantage of their locations and amenities to enjoy new adventures leave them with the best memories of their stay.

Delight Point #1: The Total Package
Whether for business or pleasure, guests say that they only truly relax and enjoy their stay when they have confidence that they can hand over all aspects of their stay to the "hotel that does it all."

Delight Point #3: Falling in Love
A coup de coeur always ensures repeat business. Accommodations that have that something extra that guests can fall in love with get the most applause from guests.

Delight Point #5: Discovering Something New
Travel has always meant opening up to new experiences. The hotel that helps its guests discover new things delivers the most delight for travelers.

Delight Point #6: Beyond Family Friendly
Family friendly is par for the course these days. Guests favor hotels that are "family supportive" and foster quality togetherness.

Delight Point #2: A Little Staff Attention Goes a Long Way
Attentive staff turns a good hotel experience into a delight. The moment a guest walks through the front door sets the tone for their entire stay.

* Over 800,000 open-ended real U.S. traveler guest reviews and 1,200 stories about delightful hotel experiences were used to develop this visualization of the factors that drive dissatisfaction, satisfaction and delight during a hotel or accommodation stay.

Courtesy booking.com

Why Alignment Diagrams?

Revisited!

- Provide a common big picture
- Help build empathy with your customers
- Help break down silos
- Reveal opportunities, and help focus future efforts on them

Creating an Alignment Diagram

Research

- Interviews
  - Customers
  - Staff
  - Leadership
- Surveys
- Business process mapping & analysis
- Analytics, business intelligence

Drafting

	Stage 1	Stage 2	Stage 3	Stage 4

State of Mind

Pain Points

Moments of Truth

Touchpoints & Actions

Internal Systems

SWOT, Organizational Vision

Drafting

	Less Consequential				More Consequential			REFERRERS	
	Initial discovery	**Exploration**	**Searching (for a specific resource)**						
	(of U of T environment)	(of available resources)	**General**	**Building to crisis**	**Experiencing Crisis**		**General**	**Building to crisis**	**Experiencing Crisis**
Typical User Type	New Student New Staff/Faculty/Student Leader	New or experienced Student New or experienced Staff/Faculty/Student Leader	New or experienced Student	New or experienced Student	New or experienced Student		Staff/Faculty/Student Leader	Staff/Faculty/Student Leader	Staff/Faculty/Student Leader
Associated Persona(s)		Explorer/Browser The Startup	The Startup The Community				The Supporter The Partner	The Supporter The Partner	The Supporter
Thoughts	"I'm excited to be going to U of T!"	"What is available to me?" "What is all this tuition paying for?"	"Who can help me find what I'm looking for?" "Why didn't somebody tell me about this?"	Not necessarily with goal in mind; just want to talk to someone Need someone to listen Want individualized support Want the right fit Don't know what to say	Specific issue that needs solving Want individualized support Want the right fit		"How do I make a good or proper referral?" "Is this information correct or up to date? It may not match what I remember" "I want to help, but I don't know what is most appropriate"	"There is nothing worse than sending a student to the wrong place" "I want a specific person to refer a student to" "I don't want to make this worse by adding more confusion - need to send them to the right person" "This student has trusted me in a moment of vulnerability; I must honor that and give the student full attention and respect." "I want to help, but I don't know what is most appropriate"	"Who is the right person to help this student?" "I want a specific person to refer a student to" "I don't want to make this worse by adding more confusion - need to send them to the right person" "This student has trusted me in a moment of vulnerability; I must honor that and give the student full attention and respect."
Feelings	Overwhelmed Excited Seeking connection (to other students)	Curious Hopeful Seeking connection (to other students)	Curious Bored Engaged Seeking connection (to other students)	Anxious Confused Stressed Skeptical Worried Becoming overwhelmed Desire for privacy (feeling of shame)	Panic Upset Lost Isolated Anxiety (about accessing services, as well as anxiety as m.h.) Impatient Angry Fear Overwhelmed Desire for privacy Shame		Supportive Want to help	Supportive Concern Empathy Unease (about getting it wrong) Want to help Pressure Worried about getting it wrong/a student slipping through the cracks when they need support	Supportive Nervous Feel the need to direct the student to the RIGHT spot Want to help Pressure Terrified of getting it wrong/a student slipping through the cracks when they need support
Actions	Search online Attend intro sessions Explore e-mails	Explore UofT website, Explore College Website Explore Social Media Talk to other students	Ask a roomate Ask floor Don Ask front desk @ College Search Online Pick up an Information Pamphlet	Ask Floor Don	Talk to someone		Searching Conferring with colleagues	active listening	duty of care for privacy & ethical considerations
Pain Points	Information not centralized Information overload Existing directories not comprehensive Can't physically find resource/don't know where it is or how to get there Siloed information - don't get whole picture	Information not centralized Information overload Existing directories not comprehensive Can't physically find resource/don't know where it is or how to get there Student mental model does not match how resources are organized Siloed information - don't get whole picture	Specifics of accessing a given resource not always clear Expect UofT pages to be discoverable (indexed) from Google Search page Incorrect/Out of Date Information	Lack of personal touch	Fear of failure in seeking out information		Huge and decentralized institution availability Frustration with not being able to find what looking for on website	Not having information at hand - leaving the conversation to look something up online may leave the student feeling unheard, or like their issue is complicated and thus increase the anxiety of pursuing a solution	Not having information at hand - leaving the conversation to look something up online may leave the student feeling unheard, or like their issue is complicated and thus increase the anxiety of pursuing a solution
Moments of Truth	Wow, U of T has THAT service?! When students give up on accessing services, because it takes too long	Wow, U of T has THAT service?! When students give up on accessing services, because it takes too long	Can't find desired resource Bad experience with staff member Local staff may have fragmented knowledge - not getting best answer because they don't know the full When students give up on accessing services, because it takes too long	Bad experience with staff member Long access times, accepts failure Bad experience with roomates	Bad experience with staff member Long access times, accepts failure Bad experiences with roomates				
Touchpoints	(digital) Web Search Social Media (analog) Intro Package (e.g. college) (human) Concierge (not yet existing) Frosh Leaders Orientation	(digital) Web Search Social Media AskMe Database Student Life app Chat Bot (human) Concierge (not yet existing) Word of Mouth (analog)	(digital) Web Search AskMe Database Student Life app Social Media (human) Dons / Student Leaders Registrars Concierge (not yet existing)	(digital) Web Search AskMe Database Student Life app Social Media (human) Dons / Student Leaders Registrars Concierge (not yet existing)	(digital) Web Search AskMe Database Student Life app Social Media (human) Dons / Student Leaders Registrars Concierge (not yet existing)		Resource Referral Guide (analogue) Web search (digital) --> leads to calling colleague (human) if unsuccessful Colleague (human)	Colleague (human)	Colleague (human) - call or walk the student over the person

Design & Refine!

Case Study:

Resource-Seeking Experience Map

Project Purpose/Requirements

- Semester-long group project for Representing UX (INF2192)
- Study a domain provided by a U of T sponsor
- Create alignment diagram to summarize that domain and give the sponsor clear opportunities for improving their customers' experiences.
- Redesign a key touchpoint represented on the diagram

Project Sponsor & Domain

Sponsor: Student and Campus Community Development

Domain:

- Resource-seeking;
- Establishing healthy resource-seeking behaviour

Resource: Services provided to students by the University

Resource Referral Guide

University of Toronto
St. George Campus
resource referral guide

How can we help?

Key Considerations

Two user types

- Students (across year level, program of study, undergrad/grad)
- Referrers

Importance of crisis

- Resource seeking behaviour changes when the student is in crisis or in an agitated state leading up to a crisis (pre-crisis).

Research Phase

Interviews:

- Students (across year level, program of study, undergrad/grad)
- Student leaders (dons, members of peer support programs)
- Front-line staff
- Student Life leadership

Survey:

- Measuring touchpoints frequency/importance

Drafting

	B	C	D	E	F		H	I	J
	Less Consequential				**More Consequential** →			**REFERRERS**	
	Initial discovery (of U of T environment)	**Exploration** (of available resources)	**Searching (for a specific resource)**				**General**	**Building to crisis**	**Experiencing Crisis**
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Associated Persona(s)		Explorer/Browser; The Startup	The Startup; The Community				The Supporter; The Partner	The Supporter; The Partner	The Supporter
Thoughts	"I'm excited to be going to U of T!"	"What is available to me?"; "What is all this tuition paying for?"	"Who can help me find what I'm looking for?"; "Why didn't somebody tell me about this?"	Not necessarily with goal in mind; just want to talk to someone; Need someone to listen; Want individualized support; Want the right fit; Don't know what to say	Specific issue that needs solving; Want individualized support; Want the right fit		"How do I make a good or proper referral?"; "Is this information correct or up to date? It may not match what I remember"; "I want to help, but I don't know what is most appropriate"	"There is nothing worse than sending a student to the wrong place"; "I want a specific person to refer a student to"; "I don't want to make this worse by adding more confusion - need to send them to the right person"; "This student has trusted me in a moment of vulnerability; I must honor that and give the student full attention and respect."; "I want to help, but I don't know what is most appropriate"	"Who is the right person to help this student?"; "I want a specific person to refer a student to"; "I don't want to make this worse by adding more confusion - need to send them to the right person"; "This student has trusted me in a moment of vulnerability; I must honor that and give the student full attention and respect."
Feelings	Overwhelmed; Excited; Seeking connection (to other students)	Curious; Hopeful; Seeking connection (to other students)	Curious; Bored; Engaged; Seeking connection (to other students)	Anxious; Confused; Stressed; Skeptical; Worried; Booming overwhelmed; Desire for privacy (feeling of shame)	Panic; Upset; Lost; Isolated; Anxiety (about accessing services, as well as anxiety as m.h.); Impatient; Angry; Fear; Overwhelmed; Desire for privacy; Shame		Supportive; Want to help	Supportive; Concern; Empathy; Unease (about getting it wrong); Want to help; Pressure; Worried about getting it wrong/a student slipping through the cracks when they need support	Supportive; Nervous; Feel the need to direct the student to the RIGHT spot; Want to help; Pressure; Terrified of getting it wrong/a student slipping through the cracks when they need support
Actions	Search online; Attend intro sessions; Explore e-mails	Explore UofT website,; Explore College Website; Explore Social Media; Talk to other students	Ask a roomate; Ask floor Don; Ask front desk @ College; Search Online; Pick up an Information Pamphlet	Ask Floor Don	Talk to someone		Searching; Conferring with colleagues	active listening	duty of care for privacy & ethical considerations
Pain Points	Information not centralized; Information overload; Existing directories not comprehensive; Can't physically find resource/don't know where it is or how to get there; Siloed information - don't get whole picture	Information not centralized; Information overload; Existing directories not comprehensive; Can't physically find resource/don't know where it is or how to get there; Student mental model does not match how resources are organized; Siloed information - don't get whole picture	Specifics of accessing a given resource not always clear; Expect UofT pages to be discoverable (indexed) from Google Search page; Incorrect/Out of Date Information	Lack of personal touch	Fear of failure in seeking out information		Huge and decentralized institution availability; Frustration with not being able to find what looking for on website	Not having information at hand - leaving the conversation to look something up online may leave the student feeling unheard, or like their issue is complicated and thus increase the anxiety of pursuing a solution	Not having information at hand - leaving the conversation to look something up online may leave the student feeling unheard, or like their issue is complicated and thus increase the anxiety of pursuing a solution
Moments of Truth	Wow, U of T has THAT service?!; When students give up on accessing services, because it takes too long	Wow, U of T has THAT service?!; When students give up on accessing services, because it takes too long	Can't find desired resource; Bad experience with staff member; Local staff may have fragmented knowledge - not getting best answer because they don't know the full; When students give up on accessing services, because it takes too long	Bad experience with staff member; Long access times, accepts failure; Bad experience with roomates	Bad experience with staff member; Long access times, accepts failure; Bad experiences with roomates				
Touchpoints	(digital) Web Search; Social Media; (analog) Intro Package (e.g. college); (human) Concierge (not yet existing); Frosh Leaders; Orientation	(digital) Web Search; Social Media; AskMe Database; Student Life app; Chat Bot; (human) Concierge (not yet existing); Word of Mouth; (analog)	(digital) Web Search; AskMe Database; Student Life app; Social Media; (human) Dons / Student Leaders; Registrars; Concierge (not yet existing)	(digital) Web Search; AskMe Database; Student Life app; Social Media; (human) Dons / Student Leaders; Registrars; Concierge (not yet existing)	(digital) Web Search; AskMe Database; Student Life app; Social Media; (human) Dons / Student Leaders; Registrars; Concierge (not yet existing)		Resource Referral Guide (analogue); Web search (digital) --> leads to calling colleague (human) if unsuccessful; Colleague (human)	Colleague (human)	Colleague (human) - call or walk the student over the person

Drafting

Stages	Exploring		Searching					
	Discovery	Exploration	General	Pre-Crisis	Crisis	General	Pre-Crisis	Crisis
User Types	New	New or experienced	New or experienced student			Referrer		
Thoughts	"I am excited to be going to UofT!" / "There is so much, where do I begin?" / "What is available to me? What can I do?" / "What is all my tuition paying for?"		Curious / Bored / Engaged / Seeking connection	Anxious / Confused / Stressed / Skeptical / Worried / Becoming overwhelmed / Desire for privacy / Shame	Panic / Upset / Lost / Isolated / Impatient / Angry / Fear / Overwhelmed			
Emotions								
Pain Points						Huge and decentralized institution / availability / Frustration with not being able to find what looking for on website		Not having information at hand - leaving the conversation to look something up online may leave the student feeling unheard, or like their issue is too complicated and thus increase the anxiety of pursuing a solution
Moments of Truth	"Wow, U of T has THAT service?!" / When students give up on accessing services, because it takes too long.		Can't find desired resource / Bad experience with staff member / Local staff may have fragmented knowledge - not getting best answer because they don't know the full when students give up on accessing services, because it takes too long	Bad experience with staff member / Long access times, accepts failure / Bad experience with roommate				
Actions & Touchpoints								
Goals & Vision	Give students overview of available resources / Direct students to necessary resources / Don't overwhelm / Support students finding and developing communities and (social) support networks	Make exploration easy / Make use case of each resource clear / Foster healthy resource-seeking activities / Support students finding and developing communities and (social) support networks	Make resource finding easy / Make students feel supported / Empower students to find resources independently / Foster healthy resource-seeking activities / Referring is an important service provided to students by the university	Make resource finding easy / Make students feel supported / Provide personal/human touchpoints / Prevent student from experiencing crisis	Provide support to students in crisis / De-escalate them out of the crisis	Consider referral a service in and of itself, and resource/support it as such		Referrer's engaging in self-care / Knowing you are part of a larger system, you are not a health care provider, the resource you are sending the student to is the person who can help them / Self-care and self-awareness
Opportunities	Stress primacy of registrars / Offer personalized resource suggestions based on student life cycle / Scaffold information	Making sure Referral Guide is in all the right hands / Stress importance of peer groups / Offer personalized resource suggestions based on student life cycle / Just-in-time/personalized information delivery / Scaffold information	Offer personalized recommendations / Ensure organization of resources matches student mental model, not organization structure / Highlight role of Registrars / Just-in-time/personalized information delivery / Scaffold information	Mindfulness / Writing Centre / Workshops to student staff members / Peer support resources / Just-in-time/personalized information delivery	More accessible appointment booking system / Broaden options for appointment times / Improve wait times	Consider referral a service in and of itself, and resource/support it as such / Provide information/training on how to make referrals, how to make the best/most informed referrals / Consistency - all information coming from the same place / Additional training for frontline staff / UofT Concierge	Keep the focus on human touchpoints / Making sure people are being sent to appropriate resources / Information/training on how to assess the situation and determine the level of need / additional training for frontline staff	Keep the focus on human touchpoints / Information/training on how to deal with a student in crisis / Information/training on self-care

Refining

Stage	Exploring		Searching					
	Discovery	Exploration	General	Pre-Crisis	Crisis	General	Pre-Crisis	Crisis
User Types								
Thoughts & Emotions	I'm excited to be going to U of T!	What is available to me? / What is all this tuition paying for?	Who can help me find what I'm looking for? / Why didn't somebody tell me about this?	Want individualized support / Want the right fit / Just want to talk to someone / Need someone to listen / Don't know what to say	Specific issue that needs solving	How do I make a good or proper referral? / Is this information correct or up to date? It may not match what I remember / I want to help, but I don't know what is most appropriate	I want a specific person to refer a student to / I don't want to make this worse by adding more confusion - need to send them to the right person / This student has trusted me in a moment of vulnerability; I must honor that and give the student full attention and respect. / There is nothing worse than sending a student to the wrong place	Who is the right person to help this student?
Pain Points	Information not centralized / No big picture / Information overload / Existing directories not comprehensive / Wayfinding	Specifics of accessing resources not always clear / Out-of-date/conflicting information / Online information not always discoverable	Lack of personal touch	Fear of failure in seeking out information		Information not effectively centralized	Not having relevant information immediately at hand / Leaving student to go find necessary info can...	Specifics of accessing resources not always clear / Out-of-date/conflicting information / Online information not always discoverable
Moments of Truth	When students give up on accessing services, because it takes too long / Wow, U of T has THAT service?! / When students give up on accessing services, because it takes too long	Can't find desired resource / Bad experience with staff member / Local staff may have fragmented knowledge - not getting best answer because they don't know the full	Bad experience with staff member / Long access times, accepts failure / Bad experience with roomates					
Touchpoints	Student Leaders / Registrars / Peers / Concierge / College Intro Package / Resource Pamphlets		Web Search / Social Media / Student Life app / AskMe / Student Leaders / Registrars / Peers / College Intro Package / Resource Pamphlets	Web Search / Social Media / Student Life app / AskMe		Resource Referral Guide / Resource Pamphlets / Colleague / Direct Physical Referral / University Website / Web Search	Colleague / Direct Physical Referral / College Intro / Guides / Pamphlets	
Strategy, Goals & Vision	Give students overview of available resources / Direct students to necessary resources / Don't overwhelm / Support students finding and developing communities and (social) support networks	Make use case of each resource clear / Foster healthy resource-seeking activities / Support students finding and developing communities and (social) support networks	Make resource finding easy / Make students feel supported / Empower students to find resources independently / Foster healthy resource-seeking activities / Referring is an important service provided to students by the university	Make resource finding easy / Make students feel supported / Provide personal/human touchpoints	Provide support to students in crisis / De-escalate them out of the crisis	Consider referral a service in and of itself, and resource/support it as such	One-off compassion fatigue workshop / Health benefits for employees / Training programs for staff	Referrer's engaging in self-care / Knowing you are part of a larger system, you are not a health care provider, the resource you are sending the student to is the person who can help them / Self-care and self-awareness
Opportunities	Stress primacy of registrars / Offer personalized resource suggestions based on student life cycle / Scaffold information	Offer personalized recommendations / Stress importance of Registrars / Organize information to match students' mental models / Use common data across all channels / Making sure Referral Guide is in all the right hands / Stress importance of peer groups / Offer personalized resource suggestions based on student life cycle / Just-in-time/personalized information delivery / Scaffold information	Ensure organization of resources matches student mental model, not organization structure	Mindfulness / Writing Centre / Workshops to student staff members / Peer support resources / Just-in-time/personalized information delivery	More accessible appointment booking system / Broaden options for appointment times / Improve wait times	Consider referral a service in and of itself, and resource/support it as such / Provide information/training on how to make referrals, how to make the best/most informed referrals / Consistency - all information coming from the same place / Additional training for frontline staff / UofT Concierge	Keep the focus on human touchpoints / Making sure people are being sent to appropriate resources / Information/training on how to assess the situation and determine the level of need additional training for frontline staff	Keep the focus on human touchpoints / Information/training on how to deal with a student in crisis / Information/training on self-care

Refinining

Resource-Finding Experience Map
University of Toronto (St. George Campus)

Resource-Finding Experience Map
University of Toronto (St. George Campus)

Legend:
- State of Mind — emotional state: curious, positive, anxious, negative
- Touchpoint importance: ★★★ most — ★ least
- Touchpoint transitions: non-linear, customizable

Resource Seeker

Student | **Referrer (Staff, Faculty or Student Leader)**

Stages

Student				Referrer		
Discovery & Exploration	General Search	Pre-Crisis Search	Crisis Search	General Search	Pre-Crisis Search	Crisis Search

State of Mind

Before finding:

- (curious) "What is available to me? What can I do?"
- (anxious) "There is so much information, where do I begin?"
- (curious) "How can I find what I am looking for?"
- (anxious) "Why can't I find it?"
- (positive) "I just want someone to talk to who will listen to me."
- (anxious) "I don't know what to say…"
- (negative) "I need help."
- (negative) "Why is this happening? People will judge me if they know."
- (curious) "How do I make a good or proper referral?"
- (anxious) "Is this information correct? It doesn't match what I remember."
- (positive) "This student has trusted me in a moment of vulnerability; I must honor that and give the student my full attention."
- (anxious) "I don't want to make this worse by adding more confusion. I need to send them to the right person."

After finding:

- (positive) "That sounds cool, I want to try that!"
- (positive) "Oh, there it is! Got it!"
- (anxious) "Maybe this will be able to help me?"
- (anxious) "Someone is here for me, maybe they can help me."
- (positive) "I know where to find that!"
- (positive) "I am glad I knew who could help."
- (negative) "I hope I made the right referral."

Actions & Touchpoints

- Explore online / Attend information meetings / Browse physical materials
- Search for resources using specific queries
- Talk to people / Search online
- Talk to people / Search online
- Talk to colleague(s) / Refer to guidebooks / Search online
- Use prior experience or talk with colleague(s) to direct students to most appropriate resource(s)

Touchpoints:
- ★★ Student Leaders, Registrars, Peers
- ★ College Onboarding Material, Resource Pamphlets
- ★★ Web Search, Social Media, Student Life app, AskMe
- ★★★ Peers, Registrars, Student Leaders
- ★★ Web Search, Student Life app
- ★★★ Peers, Registrars, Student Leaders
- ★ Web Search, Student Life app
- ★★ Colleagues Direct Referral
- ★★ Resource Referral Guide, Resource Pamphlets, Onboarding Materials
- ★★ University Website, Web Search
- ★★★ Colleagues Direct Referral

Pain Points

Student				Referrer		
Information overload	Can't find information	Feeling unheard or beyond help / Not knowing where to go for support / Fear being judged		Can't find information		Relevant information isn't readily available / Lack of confidence in the accuracy of available information

Information is not centralized nor comprehensive - not always easily discoverable

Moments of Truth

- Bad experience with staff member sours student on all staff
- Long wait times to access the resource (by rumor or experience), so they feel that they will never get it anyways
- Social stigmas around help-seeking prevent students from beginning their search
- Student reporting bad post-referral experience changes future referral decision-making

Can't find desired resource -> assume it doesn't exist

Opportunities

- Offer personalized, just-in-time recommendations based on student life cycle
- Improve peer support resources
- Ensure Resource Referral Guide is in all the right hands
- Pre-crisis assessment training
- Crisis scenario training
- Self-care training
- Stress importance of Registrars
- Organize information to match students' mental models
- Create concierge service to offer centralized resource-finding with a personal touch
- Informed referral training
- Empathy training
- Keep the focus on human touchpoints
- Use common data source for all information channels advertizing resources
- Create online repository for information that is **centralized, comprehensive, and consistent** - such as an online Resource Referral Guide for all audiences

State of Mind: Student

😐 "What is available to me? What can I do?"

😐 "How can I find what I am looking for?"

😖 "There is so much information, where do I begin?"

😖 "Why can't I find it?"

🙂 "That sounds cool, I want to try that!"

🙂 "Oh, there it is! Got it!"
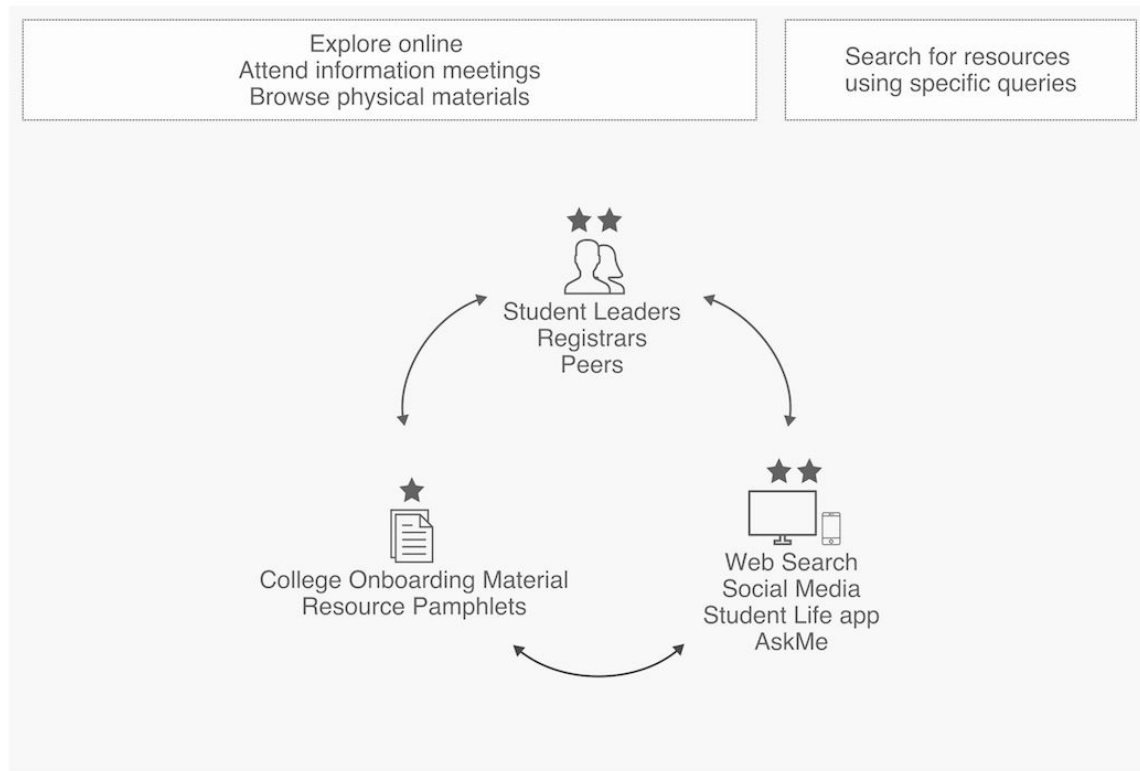
State of Mind: Referrer

"How do I make a good or proper referral?"

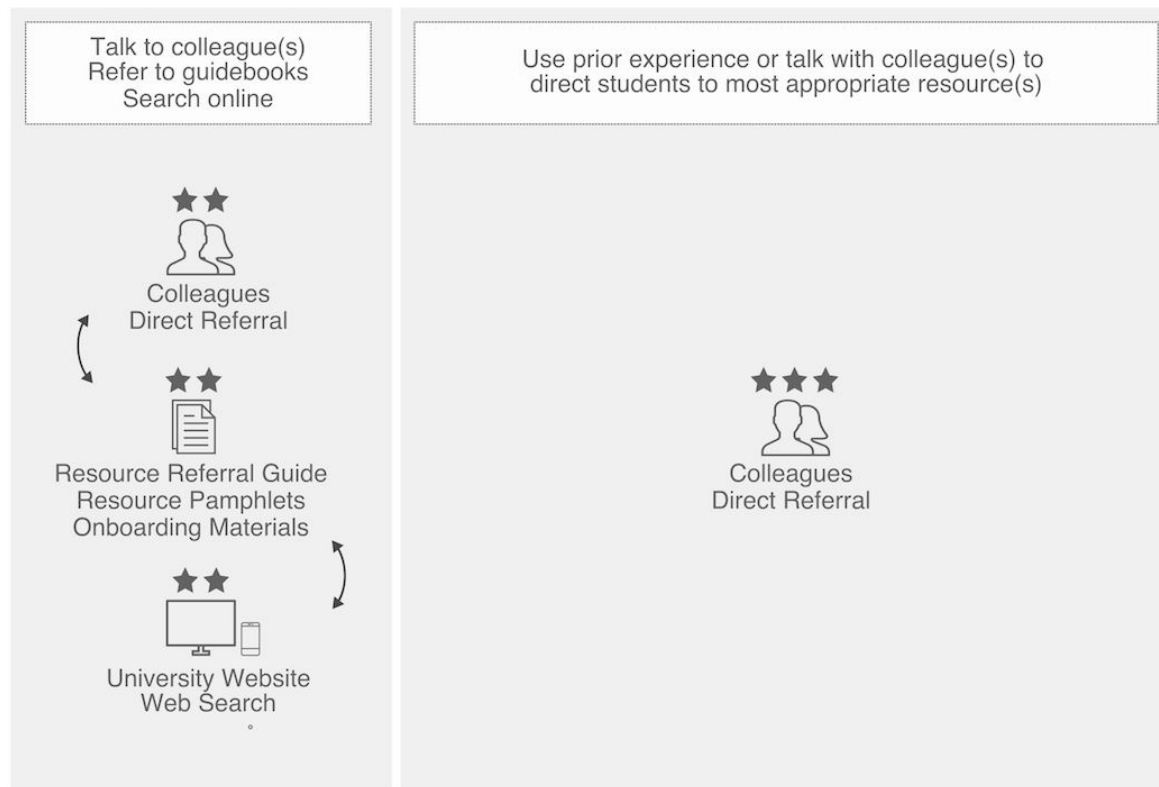"Is this information correct? It doesn't match what I remember."

"I know where to find that!"

Touchpoints: Students

Explore online
Attend information meetings
Browse physical materials

Search for resources
using specific queries

★★
Student Leaders
Registrars
Peers

★
College Onboarding Material
Resource Pamphlets

★★
Web Search
Social Media
Student Life app
AskMe

Touchpoints: Referrers

Moments of Truth

Bad experience with staff member sours student on all staff
Long wait times to access the resource (by rumor or experience), so they feel that they will never get it anyways
Social stigmas around help-seeking prevent students from beginning their search

Can't find desired resource -> assume it doesn't exist

Opportunities: Students

Offer personalized, just-in-time recommendations based on student life cycle

Improve peer support resources

Stress importance of Registrars

Organize information to match students' mental models

Create concierge service to offer centralized resource-finding with a personal touch

Use common data source for all information channels advertizing resources

Create online repository for information that is **centralized, comphrensive, and consistent** - such as an online Resource Referral Guide for all audiences

Opportunities: Referrers

Ensure Resource Referral Guide is in all the right hands

Informed referral training

Empathy training

Pre-crisis assessment training

Crisis scenario training

Self-care training

Keep the focus on human touchpoints

Next Steps

Student Life has a large printed version of this diagram now!

It's helping to inform how they think about improving resource seeking for students.

They're striving to become more **aligned** in how they approach the problem.

Quick Shout-out

My project team was awesome!

If you want to explore alignment diagrams or other forms of in-depth user research, talk to us:

Me: evan.moir@utoronto.ca

Mike: mikej.clark@utoronto.ca
(Manager, User Experience and Process Improvements)

Thanks!

Any questions?

Evan Moir

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