

Customer Journey Map + CX Roadmap Development Case Study



Integrated payer and primary care provider develops multi-year customer experience strategy by better understanding the customer journey

Background and Objectives

A large integrated payer and primary care provider was in the initial stages of becoming more patient- and member-centric in its approach to strategy development and decision-making. BCE had recently outlined the organization's customer listening strategy and had begun analyzing monthly VOC data as the foundation for becoming more customer-centric. With new insights emerging from this process, BCE and the client began identifying a need to better understand the full customer experience across the client's lines of business to improve the customer journey. As a result, the client asked BCE to identify key personas across its three lines of business, develop the corresponding customer journey map describing their paths through the organization, and prioritize opportunities to improve the customer experience going forward.

BCE began its eight week project by interviewing key internal stakeholders and capturing their perceptions of the various customer types within the organization (personas) and the range of positive and negative experiences that exist across the organization today. BCE also worked with a graphic note-taker to humanize and make more relatable these discussions by matching key insights from the conversations with artist renderings of the interviewees themselves.

With an initial set of hypotheses developed on key personas and potential highs and lows of their experiences with the client today, the BCE team then embedded itself within the client's contact center for 48 hours to hear customers speak directly about these experiences. BCE directly interviewed more than 20 new and existing customers across the client's three lines of business after they had completed service/inquiry calls with a customer service representative. These interviews allowed BCE to both begin diagnosing the "why" behind certain positive and negative experiences within the customer journey today, as well as broadening the list with more customer-defined highs and lows.

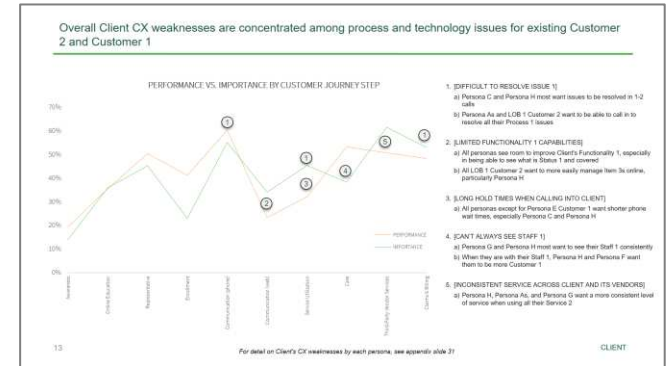
Approach

Using these rich learnings from both internal and customer qualitative interviews, BCE then developed a customized survey sent to existing and prospective customers across lines of business. The purpose of this survey was to refine specific steps of the customer journey, understand the most important elements for customers at each step of the journey, and identify where the client was meeting, exceeding, and falling short of customer expectations. BCE designed, deployed, and analyzed a survey with more than 2k responses, working with our client to target survey distribution and maximize survey response.

Once the survey was complete, BCE performed key drivers analysis to understand – on an individual persona basis – the most critical elements of the experience across lines of business and across digital and physical touchpoints. The output of this analysis was a customized matrix assessing more than 300 variables of the client's customer experience across 7 discrete personas that allowed BCE to prioritize key improvement areas for the client's customer experience going forward.

BCE highlighted 17 discrete elements of the customer experience that members and patients highlighted as very important to them but where they perceived the client to be deficient. BCE helped to prioritize these elements by evaluating which attributes were common across most groups, which were particularly acute in target customer segments, and which were foundational to ongoing strategic efforts (e.g. digital transformation). Once BCE had prioritized these "CX imperatives," BCE then developed tactical recommendations on remedying these pain points by evaluating monthly VOC feedback and other open-ended feedback from the survey.

Recommendations



ATTRIBUTE	C	B	U	Q	W	L	O	AVG IMPORTANCE	AVG PERFORMANCE	AVG DIFFERENCE
1 PROCESS 1 I want my Process 1 problem solved meeting Metric 1								■	■	■
2 DIGITAL I want to schedule, change, or cancel my Item 1 using the website/portal								■	■	■
3 DIGITAL I want to find which Staff touches me via Status 1 and find Status 2 through the website								■	■	■
4 PHONE WANT I don't want to wait on hold for a long time when I call in to my Organization 1/Organization 2								■	■	■
5 STAFF 1 I want my Staff 1 to listen to my preferences and give me clear information 1								■	■	■
6 STAFF 1 I want my Staff 1 to be Attribute 1 and Attribute 10 during Item 2a								■	■	■
7 STAFF 1 I want to guarantee that I can see the Staff 1 I already know and like								■	■	■
8 RESOLUTION I would like a Staff 2 to be knowledgeable and give me detailed information over the phone to resolve my issue								■	■	■
9 VENDOR I want to receive the same quality of customer service when using all the Service 2 offered by the Staff 1								■	■	■
10 PROCESS 1 I would like to be able to solve any Process 1 issues over the phone								■	■	■
11 PHONE I want a Staff 2 to be able to answer my questions and explain any changes in my Service 2 or pricing without								■	■	■
12 PROCESS 1 I want Staff 2 to go above and beyond working on my behalf to resolve my Process 1 issues								■	■	■