Configuration: Customer Journey

Introduction

The Engage Process Suite is used by organisations for many different themes and management goals. They include Continuous Improvement, Risk management/ FMEA, digital and organisational transformation etc. Our consultants have a lot of experience in configuring the settings of the Suite for these different purposes. All their experiences and a lot of wonderful input from many customers, has now been bundled in Standard Configurations. With these configurations our customers' key users can manage the settings of the Suite in an effective and efficient way aimed at these themes. Where needed, our consultants can provide guidance or help to complete the configuration.

General

A so-called Customer Journey's layout of processes is used by many organisations for creating awareness of the customers' emotions and feelings during their contact with your organisation. Especially moments of customer-contact are visualized. The Customer Journey can be used effectively for evaluating and discussing the current situation of a process or possible improvements.

Note: Many different theories and practices are in use for showing Customer Journeys. At Engage Process we have selected one that is frequently referred to. Please contact our account managers for sharing your thoughts and experiences.

Engage Process Suite Modules needed (x) or preferred (*):

Name	Needed/Preferred
Modeler	x
Viewer	
Authorization	
Tables	
Publisher	
Teamboard	
Feedback	
Brainstorm	

For which subscriptions?

This configuration can be used in **all** our subscriptions.

Creating the configuration per Module

Engage Process Modeler

- Go to Tab '**Home**' and '**New**' to create a Table type '**Customer Journey**' and give it scope '**Steps**' '**All Step Types**'. Add the following values in this table:
    - Satisfied;
    - Neutral;
    - Dissatisfied;
    - Internal;
    - Support

If you want to create the Customer Journey view in multiple projects, you might want to create the table in '**Tables**' instead.

- Go to Project settings to change the color of the first 3 Swim Lanes to Green, light Orange and Red.
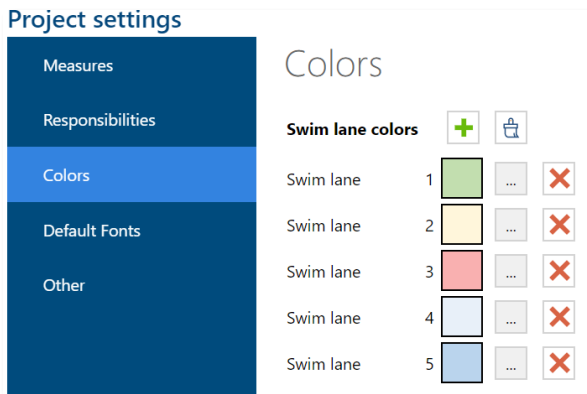
Careful!
- All processes in the current project will get these colors in their swim lane view. We suggest that you create a separate project for processes that you want to show as Customer Journey and create or copy your processes to that location.

You are now completed the settings and are now ready to assign the values you've defined to each process step.

After doing so, you can go to Tab '**Lay-out'** and select the Swim Lane '**Customer Journey'**
Next, drag-and-drop the swim lanes in the sequence of their number.

Procedural approach
- Map all customer contact moments in your processes; sometimes called the '*moments of truth'*;
- Use the '**Description**' window to list all activities within the contact moment;
- Use the '**Remarks**' window to reflect the customer experience and happiness;
- You can additionally use the '**Note**' field of individual process steps to give an extra comment about the Customer experience. This Note will be shown as a yellow sticker in the process map.
- You can even use the 'Risk' signal, via the Mini Property Editor of each process step if extra attention is warranted.

Example: