

SERVICE JOURNEY/ BLUEPRINT TOOLKIT

An accessible toolkit that brings together various perspectives, silos and components in a visualization of the current service experience. Blueprints show the orchestrations of people, touch-points, processes, and technology on both the front stage (what the client sees) and the backstage (what is behind the scenes) in your service. A blueprint is an extension of a service journey map as it goes deeper and looks at all the interactions both physical and digital that drive that experience forward.



PAIRS WELL WITH

This tool pairs well with Persona, as it allows the creation of profiles that embody specific key characteristics of a target user group. It also pairs well with empathy and journey maps, which provides a framework that enables the improvement of client and user experience as a service.



Persona



Journey Map



Empathy Map

Service Journey/Blueprint

A Self-Contained Toolkit

DESIRED OUTCOME

Many services can be so ingrained in organizational culture that they are no longer understood by anyone. By aligning end-to-end and cross-silo perspectives on a service experience, blueprints help organizations unite around a common understanding of how a service will function. Through increased collaboration and intentional orchestration across functions, service blueprints increase the odds that an organization can deliver and maintain its envisioned experience for users and front-line staff.

STRATEGY

With the explosion of digital products and touch-points, service experiences are becoming more complex and challenging to orchestrate. Blueprints work best in messy, ambiguous landscapes, where user pains are rooted in unidentified problems, creating unintended consequences and unpredictable experiences. They create a communal space where diverse departments can align on how the pieces for which they are responsible connect and create value as a whole. The additional perspectives help manage the complexity that comes with multiple touch-points and experiences across multiple channels and organizational silos. Blueprints can resemble approaches to process documentation but keep focus on the client experience while showing how operations deliver that experience throughout.

HOW TO USE

Blueprints are best used at the beginning of a project, as a current state blueprint to capture the experience as it is presently delivered. This helps teams align on the current state, capture observational knowledge, and identify existing service opportunities and break-downs. The actual building of a blueprint is not complicated. It involves a team of stakeholders and subject matter experts setting aside time to get together to co-create the document, each bring their unique knowledge of the scenario.

Your blueprint exposes the “behind-the-scenes” work that goes into creating and delivering that experience. Users and their actions will start off a blueprint, because we want to keep focus on what we’re asking users to do and how their experiences will unfold across time. This creates a human-centered lens through which to understand the intended experience of how it is delivered.

1. Identify a series of scenarios you would like to unpack.
2. Working with your diverse team, articulate each scenario in one or two sentences max, that capture the essence of the user experience or service. Example Scenario: A user wants to become eligible for Canadian Learning Bond (CLB) and claim the benefits.
3. Once you have articulated each scenario, choose the one that is the most prevalent, painful, or ill-defined. Addressing a worst case scenario will have a high impact on improving your service experience.

TIP: Once the blueprint has been produced, it is important to engage the views of other stakeholders to ensure it reflects the current state of the organization. There can be many versions of service journey maps and peoples’ experiences but there will only be one version of the blueprint and how the organization supports the experience.

Service Journey/Blueprint | Overview: CLB Example

Become eligible for CLB	Awareness of CLB	Requirements and Documentation	Open RESP	Apply for CLB	Maintain Account	Claiming Benefit
Immigrate to Canada	Introduction to CLB/CESP	Obtain Birth Certificate	Identify and choose an RESP promoter offering CLB	Complete CESG/CLB application form	Receive CLB	Proof of enrollment
Become a parent in Canada	Learn more about CLB/CESP	Obtain SIN	Book an appointment with RESP promoter	Send application to EDSD for assessment & determination	Make Contribution	Withdraw Funds
Recent immigrant or refugee	Subscriber	File Taxes	Travel to RESP promoter	Subscriber	Receive CESG	Financial institutions issue income tax receipts for EAPs
Canadian Citizen Parents	Community based organizations	Subscriber	Prove identity	Financial advisor	File Taxes	Subscriber
At the end of the fiscal year CRA sends a list of eligible families to CESP	Community	Service Canada Centre	Choose type of RESP	CRA (Plan Registration) is responsible for securing approval for the RESP specimen plan.	Subscriber	PSE Institutions
In 2017 there are currently about 80,000 children in care of an agency;...	Government of Canada	Canada Revenue Agency	Decide on RESP investment	CESP validates SIN through social insurance registry (SIR; Service...)	RESP Provider	RESP Provider
Income Tax Act, Canada Education Savings Act, Canada Education...	Financial Institutions	Community Organizations	Decide whether to make contributions or not	Cumulative CLB participation rate (Aged 0-13) is 34.7%	A \$100 CLB benefit will continue to be paid automatically in subsequent...	Canada Revenue Agency
	CESP sends letters to eligible Canadians once a year	Service Canada validates IDs and issues a SIN on the spot	Complete and submit application	Only about 2% of CLB requests fail. Between 3% and 7% of applications are rejected due...	Average annual persona; contribution per beneficiary in Canada for 2016	The average undergraduate student tuition fee for 2015/16 academic year was \$6,191
	38% of parents with graduate degrees are aware of the CLB...	Taxes are filed multiple ways to CRA	Immigrant/refugee or Canadian citizen	\$2,000 CLB max matching lifetime limit.	RESP contributions are: <ul style="list-style-type: none"> • subscriber property • no tax deduction • \$50,000 lifetime limit • can withdraw anytime but may trigger penalties 	60.6% of Canadians between 25 and 34 years of age have some type of degree of...

BASIC DETAILS SECTION
These components of the step are for painting an accurate, detailed, and thorough understanding of the step.

These components bring to life the action taking place in each step while also providing important context in the pursuit of insights.

Before moving to the next section, it is crucial that every component in the basic details section is fully and properly hashed out.

The completion of this section is the bare minimum for an effective service journey/blueprint.

STEP DEFINITION
A general description of what happens in the step.

TASKS/ACTIONS
The what/where of the step's interaction.

ACTORS/CHANNELS
The stakeholders or supports of the step.

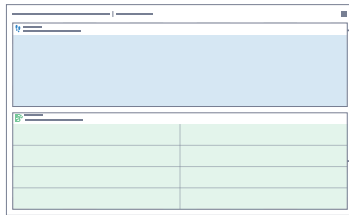
SYSTEMS
What makes this step "go".
eg. tech, hardware, process...

METRICS/DATA
Information that helps illuminate context or importance.

POLICIES/RULES
Rules or policies that dictate why something is a certain way.

Service Journey/Blueprint | CLB Step Definition + Tasks/Actions

Break down the chosen scenario into its component steps (the same steps in a journey map). Record each step on its own worksheet toolkit package on the back of this page (A), and provide a general description of what happens in each step. Steps are the necessary touch-points taken within the scenario to move it forward and reach a conclusion in the journey. The worksheet toolkit package will go through the journey of each specific step. After describing the step, fill out the task/action part on the back of this page (A). The tasks/actions are points of action must that interact with the what/where of the step.



Step Definition

Record each respective step and description on its own toolkit package



Task/Action

Fill out the task/action for the specified step in the provided boxes on worksheet (A)

One of the steps in the Canadian Learning Bond process is applying for it. To apply, the Canada Education Saving Grant (CESG)/CLB application must be filled, completed, and submitted to Employment and Social Development Canada (ESDC) for assessment and determination.

Steps are the necessary touch-points taken within the scenario to move it forward and reach a conclusion in the journey. To enable these touch-points, points of action must be taken to interact with the what/where of the step.

Canadian Learning Bond Example

Eligible CLB	Awareness of CLB	Requirements and Documentation	Open RESP	Apply for CLB	Maintain Account	Claiming Benefits
Identify and choose an RESP promoter offering CLB	Introduction to CLB/CESG	Obtain Birth Certificate	Identify and choose an RESP promoter offering CLB	Complete CESG/CLB application form	Receive CLB	Proof of Enrollment
Book an appointment with RESP promoter	Learn more about CLB/CESG	Obtain SIN	Book an appointment with RESP promoter	Send application to ESDC for assessment & determination	Make Contribution	Withdraw Funds
Recent immigrant/refugee	Subscriber	File Taxes	Travel to RESP promoter	Subscriber	Receive CESG	Make Contribution
Canadian Citizen/Permanent Resident	Community based organizations	Subscriber	Prove Identity	Financial advisor	Investor	Subscriber
Subscriber	Subscriber	Service Canada Centres	Subscriber	Subscriber	Subscriber	Subscriber



Step Definition

A general description of what happens in one of the steps.

Large empty light blue rectangular area for defining the step.



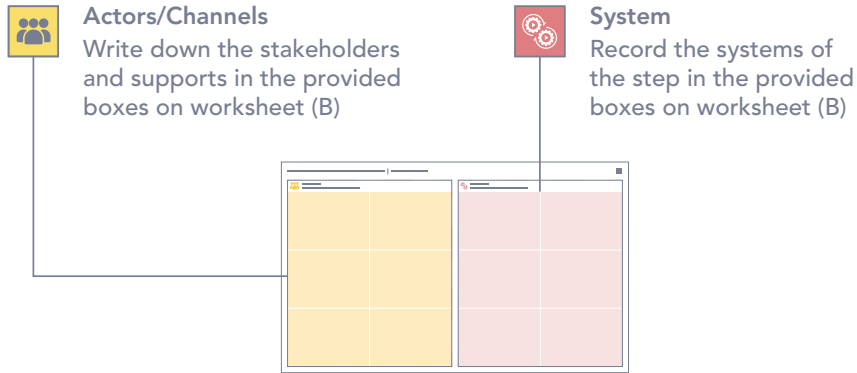
Tasks/Actions

The what/where of the step's interaction.

1	2
3	4
5	6
7	8

Service Journey/Blueprint | CLB Actors/Channels + Systems

Next, write down the stakeholders and supports of the step on the flip side of this page (B). Stakeholders are the actors of interest involved in supporting the step forward. For the systems, record what makes the step "go". Systems are in place: e.g. tech, hardware, process, etc. to ensure the step goes properly and smoothly.



In the CLB service blueprint, the stakeholders involved are the subscriber/service or program user (immigrant/refugee or Canadian Citizen) and the financial advisor as support. The systems in place are the secure approval of Registered Education Saving Plan (RESP) specimen plan through Canada Revenue Agency (CRA) and the validation of Social Insurance Number (SIN) by Canada Education Savings Program (CESP) through social insurance registry.

If you have more actors/channels and systems than the number of boxes provided on the worksheet, print more worksheets to capture the necessary information. Once all the actors/channels and systems are listed, moved on to the next part of the toolkit package.

Canadian Learning Bond Example

Recent immigrant or refugee	Subscriber	File taxes	Travel to RESP promoter	Subscriber	Provide CLB	
Canadian Citizen Parents	Community based organizations	Subscriber	Prove identity	Financial advisor	File taxes	Subscriber
	Community	Service Canada Centre	Choose type of RESP	CRA (Plan Registration) is responsible for securing approval for the RESP specimen plan.	Subscriber	PSE Institutions
	Government of Canada	Canada Revenue Agency	Decide on RESP investment	CESP validates SIN through social insurance registry (SIR; Service...	RESP Provider	RESP Provider
	Financial Institutions	Community Organizations	Decide whether to make contributions or not	Cumulative CLB participation rate (Aged 0-13) is 34.7%		Canada Revenue Agency
Book an appointment with RESP promoter	Service Canada validates ID's and issues a SIN on the spot		Complete and submit application	Only about 2% of CLB requests fail. Between 30% and 35% of		

Service Journey/Blueprint



Actors/Channels

The stakeholders or supports of the step.

1

2

3

4

5

6



Systems

What makes this step "go".

1

2

3

4

5

6



Metrics/Data

Information that helps illuminate context or importance.

1

2

3

4

5

6



Policy/Rule

Rules or policies that dictate why something is a certain way.

1

2

3

4

5

6



User Feelings

The emotions users are experiencing at certain tasks/actions.

1

2

3

4

5

6

7



User Thoughts

What is going through the users head at the time of a certain tasks/actions.

1

2

3

4

5

6

7



Follow-up Questions

Questions about a step that needs to be followed up on.

1

2

3

4

5

6

7



Critical Moments

Sources of pain and where users experience breakdown.

1

2

3

4

5

6

7



Ideas

Concepts on things to improve or fix for broader impact.

1

2

3

4

5

6

7