

## **Journey Mapping Unleashes the Power of People (Case Study, Non-Profit Sector)**

Journey maps are extremely valuable tools. They provide key insights into the thoughts and feelings of customers during their interactions with your company, and they point the way toward cost-effective solutions to problem areas. But like any tool, they won't do you much good if you take them home and stash them in a drawer.

To turn what's on the page into a dynamic and fruitful change in company philosophy, you need to have the whole company on board. And the key to doing that is to ensure that everyone is invested in the process. The maps are starting points, not destinations.

Heart of the Customer (HoC) works with companies to get all their stakeholders on the same page right from the start. We tailor our methodology to build the trust and consensus needed to propel change. Journey maps are more than just attractive, easy-to-digest compilations of important findings. Used optimally, they become a rallying point that can usher in a new era of strategic collaboration, with both immediate and long-term rewards.

In this way, the journey mapping process itself is a kind of journey, as our client Be The Match discovered. Be The Match is the world's largest bone marrow registry, matching unrelated donors with patients battling leukemia and other life-threatening illnesses. Potential donors register and provide a sample of their DNA by swabbing the inside of their cheek. This information is added to the Be The Match Registry and is searchable by doctors of patients in need of a marrow transplant. When a match is found, the volunteer donor is asked to donate.

Be The Match was the preferred provider for bone marrow donors, for obvious reasons: their image was favorable; their outreach efforts generated a wealth of new registrations; the signup process was simple and welcoming; and they offered on-point messaging informing participants what to expect. By their existing metrics, they were doing everything right. But over the course of several years, they became increasingly concerned about their falling response rate (the percentage of donors heeding the call to action when a match was made).

Understandably, Marketing Director Regan Hall Reinerth, Director of Member and Donor Shared Services Michael Smith, and Regional Director Mary Halet were frustrated. "We're so devoted to our mission that the false hope we were providing was not only costly, it was heart-breaking," she recalls. "Patients' lives are on the line, and we don't take our responsibility toward them lightly. So naturally, we made them the focus of our efforts. And working with Heart of the Customer gave us the perspective to look at things in a radical new way." That change also resulted in significant cost savings.

Before working with HoC, Be The Match considered patients and treatment centers to be their "customers," with donors providing their "product." Within that framework, the best way to serve their customers was to direct their efforts toward "stocking the shelves," and individual departments launched initiatives in line with that ethos. Marketing tackled rebranding. Operations streamlined processes. And Community Engagement redoubled their recruitment efforts. Each of these initiatives appeared to be wildly successful...yet none reversed the tide.

Be The Match's forward-thinking department leaders knew it was time to reassess their approach. It became clear that investing in an outside expert to gain a fuller understanding of the landscape, then working together to devise interdepartmental strategies informed by the results, was the way to go. As a non-profit charged with the most important and urgent mission there is – saving lives – they were determined to do everything they could to facilitate as many marrow transplants as possible, while also continuing to provide the highest level of service, and making the best use of the donations on which they rely.

Regan and her colleagues collaborated to draw up a charter to retain HoC and define the scope of the project, so that they could prepare and present the most persuasive case to their board of directors. Boards are not typically inclined to support a radical change of course, but their approval is vital to enacting sweeping measures. As is to be expected in a science-based organization, the board had a healthy respect for qualitative research and substantive proof. Working with our Mapper-in-Chief Jim Tincher, Regan and her team were able to win them over with strong data that legitimized and explained the unfamiliar customer experience concepts of which they were wary.

“Journey mapping got people to listen,” said Regan. “We were pitching a radical new approach and delving into a world we knew little about, so Jim’s guidance was critical to our success. His collaborative approach ensured that no one felt that someone else’s agenda was forced on them. This fostered an internal allegiance that allowed all voices to be heard and exploited for the good of everyone.” The agents of change were unchained.

Within the structure provided by HoC, Be The Match was able to demonstrate that the most important thing wasn’t improving marketing, or streamlining operations, or bolstering a sales force. It was getting senior management to work collaboratively, so that every department was focused on the same ultimate goal – building an improved member experience that resulted in more lives saved. “That made all the difference for us,” Regan said. “Our board knew something should be done, but the journey map and our team’s newfound insights brought it to life.”

Regan’s team never took their eyes off the prize, and understood that mapping was only a small part of the effort. “The majority – what makes it worth it – was in how a deep analysis of the customer experience and our company perspective would help us find out not only how our members think, but how we think about our members,” said Regan. “This brought our organizational priorities into focus, and allowed us to identify the structural changes needed to bring about the best outcome, with everyone working smarter together.”

Be The Match didn’t have to wait long for a revelation. “During our initial information gathering, we realized that our lack of focus on the member experience was actually leading us to an unreliable product,” said Regan, referring to registered donors who declined to follow through when a match was made. “So we had to ask ourselves, ‘Should this even be on the shelf?’ When our member availability numbers were dropping, and we were working hard to reverse it by investing in growing our registry, our measures were extremely successful...but successful only in putting more unreliable products on the shelf.”

It turns out dealing with marrow donors with the same vocabulary and strategy that you might use for breakfast cereal or boxes of pasta doesn't work. As people, potential donors are motivated by a range of experiences and feelings, and those needed to be explored in depth to get at the root of the problem with the response rate. In doing so, Be The Match turned their service model on its head. That simple change in philosophy reverberated throughout the company, resulting in renewed vigor and dedication for their mission.

“We learned that directing our efforts towards getting to know more about our *registry members* was actually the most effective way to serve our patients. Once we reframed the issue with this new understanding, we saw that we needed to stop focusing on delivering a ‘product’ and start focusing on the experience of our members.”

Those takeaways helped define the parameters for the mapping process. Next, we set about identifying our three key “personas” – the primary types of people in the potential donor pool, each representing a sizeable and distinct sector with shared traits and motivations.

“Amelia the Altruist” was motivated by a more general desire to serve the common good; this sector was engaged and enthusiastic throughout the process. “Evan the Uncle” represented the sector driven by a personal connection; these people were highly motivated and engaged initially, but that level dropped once the specific circumstances that led to their registration changed. “Brooke the Bystander” represented the sector whose primary motivation for registering was, essentially, peer pressure. These people took the same initial steps as the others, but their level of engagement was far lower.

That discovery unlocked the door: the key wasn't in why registrants *weren't* participating, but why they *were*. Be The Match's effective and well-intentioned efforts to make the registration experience simple had also made signing up easier than not signing up for lots of Brookes, who never had any real intention to follow through. The organization had been casting its net too wide.

Our journey maps pointed towards a new philosophy: registry member availability starts at the *point of recruitment* and continues throughout a member's time on the registry while they wait to be called as a match. Based on our recommendations, Be The Match “front-loaded” the registration process (by using a short survey they had been relying on later in the journey) to gauge future commitment *before* accepting and investing in registrants. And repeating the survey later on in the member journey provides Be The Match with an ongoing method to monitor engagement and predict availability.

Not only did these changes lead to a simple actionable solution that resulted in significant cost savings, the process of creating the map also led to a radical change in thinking that reverberated throughout the company.

“By reframing the problem, we were able to illuminate the solution.” Regan said. “And even though we sometimes had to listen to things we didn't want to hear, we were also reassured to discover a wealth of evidence that there were a lot of things we were doing right. That helped us not back away from the challenge. And because the input of our staff was valued throughout the

process, everyone was invested in the outcome. Including Jim. He made sure that we had the understanding and confidence to act on the map. And ran with it.”

For Be The Match, the journey mapping process funneled all of the breezes blowing around the organization into a single, powerful, gale-force wind. The end result? A more satisfied, productive, agile, and unified workforce. And, just as importantly, a framework that has helped inform new strategies across the registry member journey that is starting to improve availability of Be The Match Registry members.