CASEWORK
BASICS

JOURNEY MAPPING TO ANALYZE YOUR CASEWORK

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**CASEWORK BASICS**

DATA-DRIVEN CASEWORK

INTRODUCTION

Designing a casework process should center the constituent, no matter how they come to your team. However, for caseworkers slammed in the day-to-day details of negotiating between constituents and agencies, it can be tough to step back from the big picture to focus on the step-by-step experience for constituents.

Analyzing the casework process from a constituent's perspective can be a helpful tool for casework teams to evaluate their operations. In the tech world, particularly in Human-Centered Design (HCD) approaches to product and service development, this process is called *journey mapping*.

Journey mapping can be part of the design process for starting a new office, or a mid-Congress check-in to find places to improve. As an added benefit, exploring the experiences of different constituents together offers team members a unique cross-training experience focused on the constituent.
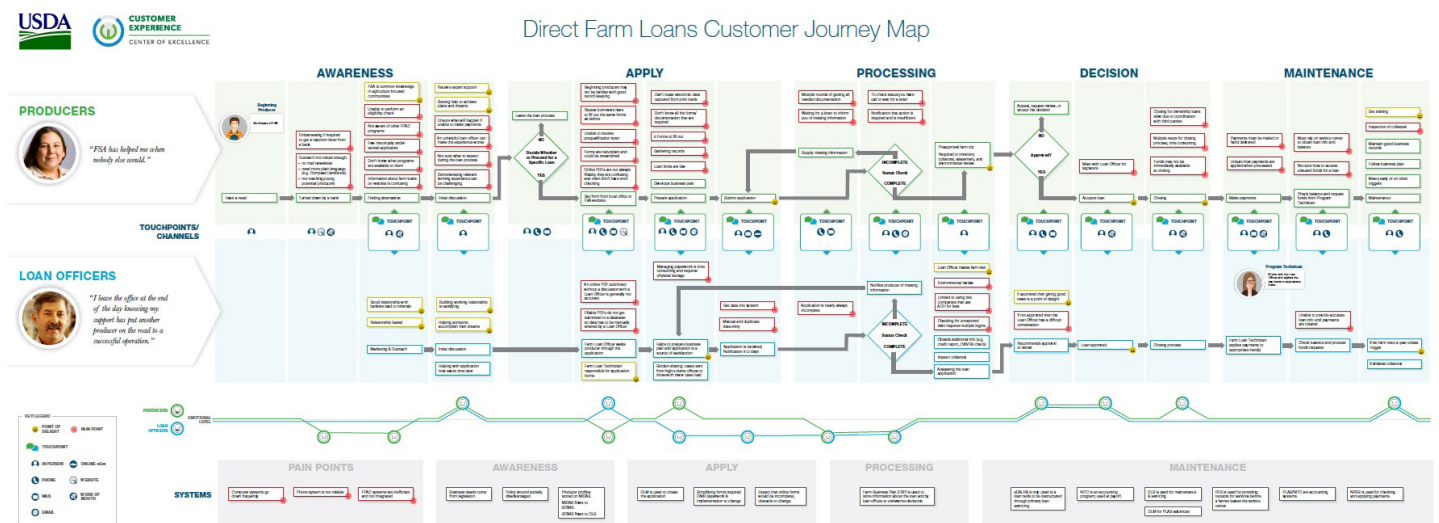
Source: USDA Farm Service Agency Direct Farm Loans Customer Journey Map

WHAT IS JOURNEY MAPPING?

18F, the US government's technology consulting and design service, defines journey mapping as:

> "A visualization of the major interactions shaping a user's experience of a product or service. [Journey mapping provides] design teams with a bird's-eye view of a service that helps them see the sequence of interactions that make up a user's experience including the complexity, successes, pain points, and emotions users experience from the earliest phases of researching a product or service all the way through adoption."

In many ways, journey mapping is a different application of a skill caseworkers have already mastered: a significant amount of casework expertise is in understanding the complex pathways constituents may travel through the federal bureaucracy, and the pain points where those paths hit roadblocks.

Journey mapping may take into account your entire casework process, from how constituents find out about your office all the way to the post-casework feedback survey, or be more targeted to zoom in on a particular aspect of interacting with your team (see below for more on how to use journey mapping to identify your goals).

Journey mapping starts with developing your *user personas*, or sample constituents who you will follow through the process at hand. While these are usually hypothetical, they should be fairly detailed, to capture as many particularities of their experience as possible. What is the constituent's age, gender, occupation, race/ethnicity, and veteran status? Do they have any disabilities? Are they a digital native? Do they prefer using a language other than English? What other factors will affect the way they interact with your team? We'd recommend an element of randomization in picking person attributes to avoid stereotyping, but it can also be helpful to try to design your most "standard" constituent or a deliberately unusual case for a constituent, depending on your goals in the exercise.

Tied into that user persona are your *user scenarios*. When will this constituent need to reach out to your office? What will make them decide to reach out? How are they feeling in that moment?

From there, with your constituent and their scenarios, you can start to trace their pathway through their experience with your office. Your team will want to decide on the start point for the constituent's journey, and the constituent's goal, and then start to fill in the interim steps.

At each step toward the goal of the process, consider the constituent's feelings, and the potential things that may encourage them or nudge them off the track toward their goal. For example, you might start with constituent A, for Alex: Alex is a 29-year-old nurse and pickleball enthusiast, runs an Instagram account for her rescue dog, and is looking for help with a problem involving the servicer for her student loans. Some questions that might shape her journey map could include:

- How will Alex find out about your team's casework service? Is it on social media? Is it from a colleague? The news?

- Does she prefer to interact with you online? Why or why not?

- How does she find your online presence? How does she find your casework team within your online presence? Are these answers different for your website vs. social media?

- How will she get from your team's online presence to interacting with a caseworker?

- How quickly will she get through that process? How will it make her feel?

- What will Alex's interactions with your team look like through the handling her case?

- Is that the only type of interaction that she'll go through (e.g., will she also be offered chances to share an opinion, review self-help materials, attend a town hall, etc.)?

- When Alex's case wraps up, how does she feel, separate from the outcome? Does she have opportunities and encouragement to share feedback?

Making this basic set of questions and user personas as detailed as possible is a great way to help your team think through the constituent experience interacting with your office. For another example, let's take constituent B, for Bernard, an 80-year-old veteran and wheelchair user who does not use computers (much to the consternation of his kids and grandkids, whom he sees often). Bernard may be seeking help with a VA claim for prostate cancer from exposure to Agent Orange.

- How will Bernard get to your physical office? Or if Bernard calls, who will handle his call and what will the process be for getting back to him and/or arranging an appointment?

- How will that physical office feel to Bernard, especially as a wheelchair user? Are there comfortable, private spaces for him to talk?

- Is Bernard reasonably protected from any physical threats in your office, or able to evacuate safely if needed?

In the process of building a journey map, it's helpful to maintain a focus on understanding the steps— saving diagnosis and suggestions for fixes until after the map is complete.

Journey mapping is a great team exercise for a micro-retreat or a staff meeting, especially using a whiteboard or a digital option like Google's Jamboard to draw out the individual steps in a constituent's journey. Bringing in a member from another team who may not be as familiar with the casework process as your own team may also be a great way to help make sure that you're asking "why" through each step of the process, or not getting bogged down too far in details. This could also be a great opportunity for others in the office to learn more about what caseworkers do on a daily basis.

With all of the steps mapped out, your team may also find it helpful to split segments of the journey into phases to identify important moments, or detail your map further with information on who's responsible for handling different steps and phases.

WHEN AND HOW SHOULD OUR TEAM INCORPORATE JOURNEY MAPPING?

Setting Up an Office

Journey mapping can be a very valuable exercise as your team sets up the basic infrastructure for how you will receive and handle constituent inquiries. Making sure that you cover all of your bases will prevent any inquiries from slipping through the cracks down the road.

Regular maintenance evaluations and audits

As your team gets settled, it can be helpful to do a regular journey mapping exercise as part of an audit for ways to improve the service you provide to constituents. This can also be a great exercise to train interns on the casework process, or make casework onboarding more interactive and engaging for new staff.

Problem-solving for an observed issue

With the volume of inquiries casework teams and Congressional offices handle, it's unavoidable that some will fall through the cracks. In these situations, a journey map can be a great tool to start thinking through some of the possible gaps in your team's process, and ways to address them. Varying the steps slightly to focus on how a constituent may NOT proceed between steps (for example, what would lead to a constituent not getting a timely call back when they leave a voicemail?) may be especially helpful.

This may also be helpful if your team identifies an absence or an under-representation in your casework data (for example, your district may have a large population of Vietnamese immigrants, but few constituents identify their race/ethnicity as Vietnamese in your post-casework follow-up survey).

Communicating agency/policy insights

Finally, journey mapping can also be a powerful method of explaining problems in processes. Caseworkers may also explore journey mapping to understand gaps in federal agency service, and/or as a tool to explain those gaps and constituent experiences to non-casework teams in their office as part of a policy recommendation.

SAMPLE EXERCISE

Goal

Examples:

- "Audit our intake process to understand why so many constituents do not respond to PRF requests"

- "Walk through our casework process, start-to-finish, to brainstorm ways our team can better work with our communications team to strengthen casework"

User Personas

Have your team pick at random from the list of names, attributes, and scenarios below. If you'd like to make sure these reflect your district, browse the Census Bureau's "My Congressional District" feature for reference. You may find it helpful to start with 2-3 different personas, but keep in mind, this should be the shortest part of the exercise!

Names
Social Security top 100 names in the last century

Occupations
Bureau of Labor Statistics occupations list

Age

Communication preference

- In person
- Over the phone
- Online

Language preference, if other than English
[Census Bureau: Top Languages Other than English Spoken in the US](#)

- Spanish
- Chinese
- French
- Tagalog
- Vietnamese
- Other

Disability? Yes/No
[University of Rochester: Common Disabilities list](#)

- Learning Disabilities
- Mobility Disabilities
- Medical Disabilities
- Psychiatric Disabilities
- Traumatic Brain Injury (TBI)
- Post-Traumatic Stress Disorder (PTSD)
- Visual Impairments
- Deaf and Hard of Hearing
- Autism Spectrum Disorders

Is this constituent a parent? Are they caring for any other people or being cared for?

Race/ethnicity, religion, other identity markers?

Journey Map

Start by defining the constituent's goal, and the journey map's starting point. From there, start to go through the intermediate steps, taking time to note how the constituent feels, or estimate timelines between steps. Work for a set period of time, or until the map feels complete. If you are working with more than one persona, take care to note where the maps diverge for different people and needs.

Analysis

- Are there clear start and endpoint goals for our journey map?

- How long can we expect our map to take constituents to travel through?

- Can our journey map be clearly divided into any phases?

- If so, which phases are in our office's control and which are not?

- Which phases felt best and worst for constituents?

- Which sections of this map are complicated or were difficult to draw out?

- Where are there opportunities for constituents to drop out of our map?

- How were different user personas' experiences different from each other?

- What can the map start to tell us about areas to improve the constituent experience with our office?

ADDITIONAL RESOURCES

18f

Check all three for additional links and reading:

- 18f: Journey Mapping
- 18f: Personas
- 18f: User Scenarios

Journey Map Example

- Digital.gov journey map example, including information on making journey mapping work for remote teams