

USER MAPPING TECHNIQUES: A GUIDE FOR THE SOCIAL SECTOR

November 2017

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Good impact practice must be based on a solid understanding of the lived experience of those who are directly affected by the problem in question. After all, how can we expect to drive change for individuals without first understanding their experiences, needs, motivations and strengths?

But despite their closeness to social issues and the people experiencing them, social sector organisations aren't always good at developing empathy and understanding of those they exist to serve. We think there's a lot that can be learned from other sectors, particularly from the world of technology and the field of user experience (UX), on how to do this well.

This short paper will outline how user mapping techniques can be used to better understand people's experiences and drive greater impact for the individuals or communities in question. We hope that it will provide a fresh perspective and encourage the social sector to be more user-led.

NPC and user-focused approaches

NPC is committed to helping the social sector retain a strong focus on the people they exist to serve in their approach to tackling social problems. In our previous paper *User voice: Putting people at the heart of impact practice*¹, we set out how organisations can harness the views of those they seek to serve in the planning, delivery and evaluation of their work. Our recent State of the Sector report *Charities taking charge*² also included primary research and commentary on some of the ways that charities are, or could be, working to integrate user perspectives. We have also been using hands-on user mapping techniques in some of our own projects, and we use these as examples in this paper.

What do we mean by 'user mapping techniques'?

When we talk about 'user mapping techniques' we refer to approaches that visually represent realised or potential experiences and behaviour over time, from the perspective of the individual(s) in question. These visual outputs

¹ Bonbright, D., Curvers, S., Hestbaek, C., and Lumley, T. (2016) New Philanthropy Capital.

² Hoare, G., Murray, P., and Shea, J. (2017) *Charities taking charge: Transforming to face a changing world*. New Philanthropy Capital.

can help those funding, designing and delivering products, services or organisations to build empathy with and understanding of the people they intend to help—their ‘users’.

Users, beneficiaries or customers?

There is no perfect word to use to refer to the people that social organisations exist to serve. In this paper we will call them ‘users’, which is the word that tech companies use for people making use of their products. We know it doesn’t translate ideally into the social sector—it could have connotations of dependency, and people who have experienced drug addiction may find it loaded. But for the purposes of service and product design we feel it has the power of pragmatism, helping to draw organisations back to the people who will be *using* what they are providing. Organisations are of course welcome to use the word that suits them.

The use of visual and creative approaches to help organisations better understand the experience of their users is becoming increasingly popular across sectors. There are many names for different mapping techniques and, as already mentioned, the terminology can be confusing. We try not to get too consumed by this and, for the purpose of this paper, we will predominately refer to ‘experience maps’ and ‘user journeys’, which, although used synonymously by some practitioners, we view as subtly distinct, defining them as follows:

- **Experience maps** tend to focus on broader experiences, for example *the experience of homelessness*. They are usually not organisation, or even sector specific. Instead, they show how different products, services and organisations fit into the wider context of a person’s life. Thus, multiple organisations can benefit from their insight.³
- **User journeys** (also known as customer journeys) tend to be narrower in focus, and demonstrate the sequence of events a user might encounter while using a specific product or service, for example *the experience of a specific service for an individual experiencing homelessness*.⁴

Both approaches are goal-driven—that is, they detail the steps needed for a real or potential user to reach a specific goal or outcome. With each, the final output will normally be a graphic illustrative ‘map’ which is likely to include information on the user or potential users’ needs, wants and expectations at each stage.⁵ Mapping the perceived or lived experience of users or potential users presents a unique opportunity to explore interactions, dependencies, efficiencies and inefficiencies between products, services and organisations. This insight can uncover gaps and/or duplications in provision and support decision-makers to develop solutions that better address need and drive greater impact for the individuals in question.

Experience maps and user journeys are usually created for a fictional character profile, referred to as a ‘persona’, with multiple personas being developed to address the range of users or potential users. Personas are based on research/insight and become more accurate and detailed over time as understanding deepens. For this reason, experience maps and user journeys should always be viewed as working documents which develop alongside your understanding of your users.

³ Kalback, J. (2015) *Mapping-Experiences-Creating-Journeys-Blueprints*. O’Reilly.

⁴ Kalback, J. (2015) *Mapping-Experiences-Creating-Journeys-Blueprints*. O’Reilly.

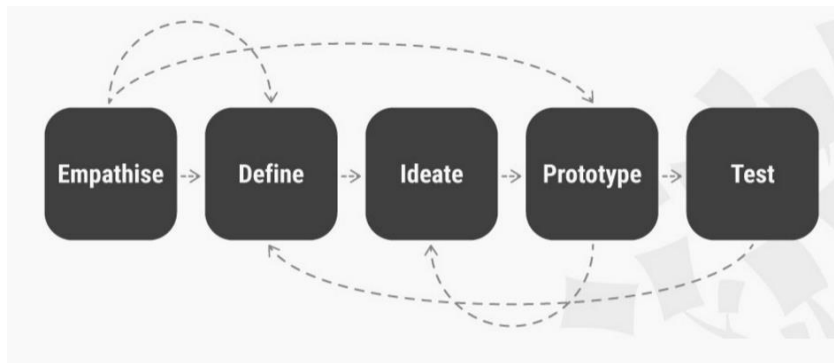
⁵ It should be noted here that a user journey is different to a donor journey, which fundraisers use to map the ideal process of cultivating, growing, and maintaining a relationship with a supporter.

Where do these techniques come from?

Experience maps and user journeys are well established within the technology sector and sit within the field of user experience (UX). UX refers to all aspects of a user's interaction with an organisation, its services, and its products.⁶ It centres on creating seamless user experiences that bring enjoyment and satisfaction across all stages of the journey to a defined goal (eg, from marketing, through to ease of access/use, follow up, etc.). From their origins in the tech world, UX approaches are increasingly being recognised across sectors and applied to understand and address user needs, pain points and opportunities in a systematic and straightforward way.

Experience maps and user journeys are a valuable tool within the discipline of [design thinking](#)⁷. Whilst we will not go into too much detail in this paper, design thinking is a 'creative approach that uses logic, imagination, intuition, and systemic reasoning, to explore possibilities of what could be—and to create desired outcomes that benefit the end user'.⁸ The process has five stages, with empathy being the first and omnipresent principle (you can read more about design thinking [here](#)⁹).

Figure 1: The five stages of design thinking



Source: [Hasso-Plattner Institute of Design at Stanford \(d.school\)](#)

Design thinking, and the development of experience maps/user journeys, work best with an [agile project management](#)¹⁰ approach. Again, we will not go into too much detail, but by this approach we mean that the team's understanding of their users, and thus the problem and possible solutions will deepen over time. The process is not as linear as the diagram above may imply and reflection, learning and iteration should be encouraged over the project lifecycle with personas, experience maps and user journeys being working documents that become increasingly accurate and detailed over time.

How can charities and funders get started with user mapping?

We believe experience mapping and user journeys can be extremely useful in helping social sector organisations to tackle complex issues, many of which can be defined as 'wicked' problems—ie, issues where the real nature of both the problem and solution are ill-defined or unknown. By involving and empathising with current/potential users we better understand the user perspective and allow the rest of the design process—defining the problem,

⁶ <https://www.nngroup.com/articles/definition-user-experience/>

⁷ <https://www.interaction-design.org/literature/article/5-stages-in-the-design-thinking-process>

⁸ <https://www.creativityatwork.com/design-thinking-strategy-for-innovation/>

⁹ <https://www.interaction-design.org/literature/article/5-stages-in-the-design-thinking-process>

¹⁰ <http://www.dummies.com/careers/project-management/agile-project-management-for-dummies-cheat-sheet/>

creating possible solutions, prototyping and testing to iterate solutions—to be led by those it seeks to serve. Being led by human need encourages the development of initiatives that are more likely to successfully address such needs, and therefore create more impact.

Despite the clear benefits, it is not yet common place for social sector organisations to map users' experiences (with the exception of fundraising departments mapping users' interactions with websites and online services) and, where it does happen, it tends to remain siloed within digital teams or be outsourced. Expanding the use of user mapping would have many benefits for the sector including:

- Enabling organisations to develop initiatives rooted in lived experience and directly target the defined needs of those they seek to serve.
- Helping social sector organisations to listen to, engage with and learn from the diverse viewpoints of their stakeholders, including the various personas they seek to serve—this could then allow them to further personalise their offering to groups with more specific or complex needs.
- Driving collaboration, recognising that multiple organisations, products and services assist people at different points and that sustainable impact is rarely caused by a single interaction with one provider.
- Highlighting duplication, inefficiencies, and opportunities for further collaboration, both within and across organisations by clearly illustrating how an individual engages with multiple services over time.
- Uncovering 'pain points' where individuals may require further support in order to progress. This can help drive service design to create solutions to blockers and maximise progress.
- Encouraging organisations to adopt a more positive approach to risk and test new ideas through piloting and prototyping.
- Promoting continual improvement, and increasing impact over time.

With these in mind, it is worth noting that such approaches will require a flexible and inquisitive approach to funding, whereby funders are open to being led by user needs as opposed to personal incentives.

Before you start

Be clear on what you're trying to achieve

Knowing the difference between experience maps and user journeys can be valuable in order to help you focus your resources on the best approach. When deciding which to use, it's critical to understand the problem you are trying to solve. Ask yourself: Do you have a solid understanding of your users real or perceived problems (ie, their pain points)? If the answer to this question is no, then you should use an experience map to get a better understanding of your users' end-to-end experience in meeting a certain goal—like stable employment, for example. If you have a better understanding of the exact problem (ie, pain point) your product, service or organisation attempts to solve a user journey is likely the right tool to enable you to hone in on a specific part of their wider journey. Remember the development of experience maps/user journeys works best with an [agile project management](#)¹¹ approach where reflection, learning and iteration are actively encouraged.

Step 1: User research

The first step in developing an experience map or user journey is to increase your understanding of your current or potential users through research and/or analysis.

Immersive research methods such as [ethnography](#) (the study of groups and people as they go about their everyday lives¹²) are often used to do this. Yet these can feel daunting for some organisations. It is worth

¹¹ <http://www.dummies.com/careers/project-management/agile-project-management-for-dummies-cheat-sheet/>

¹² <https://www.uxmatters.com/mt/archives/2010/06/ethnography-in-ux.php>

remembering that traditional qualitative research methods, such as workshops, interviews and focus groups, are also valuable ways of hearing users' voices.

Where possible, diverse opinions should be sought—for example, you may wish to consult frontline workers as well as those with lived experience—in order to build a greater understanding of the individuals and/or communities affected by the issue(s) you wish to address. Instead of conducting first hand research, some organisations may decide to utilise publicly available data sets or data they already hold, such as service evaluation data or analytics data from their digital services or presence. Although first-hand research is preferable, our advice would be to do what you can with your available budget and resources.

Once you hold data, you can segment your users or potential users into discrete groups—for example, by stage of their journey, referral source, gender, geographic location. This is known as 'user segmentation' and will provide you with some initial insight into your current or potential user base. You should consider your organisation's mission when deciding what segments will be most insightful for you. User segmentation is a common technique in marketing and communications, where content is often personalised to better target specific audiences. Depending on the skills and experience you have, this could be undertaken in-house or by engaging an external user experience, analytics or service design agency.

Step 2: Creating personas

The next stage is to use the initial insights gained from your user research to create user personas. Personas seek to be realistic representations of the individuals or communities you wish to serve. Whilst they can vary greatly in their level of detail—and the characteristics included will vary from project to project—personas generally include the following key pieces of information:

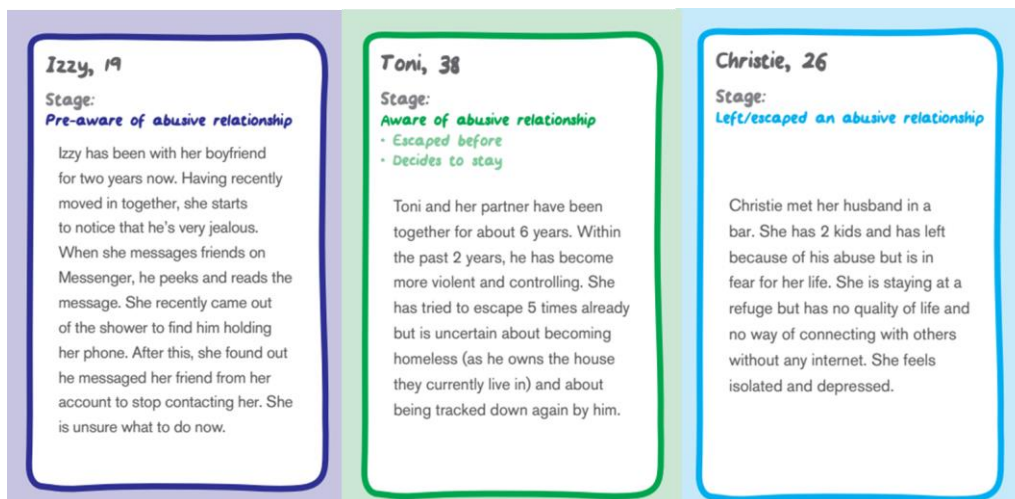
- a defined persona group—for example, women with experience of domestic violence
- a fictional name—that the team will use to distinguish between personas during the design process
- a photo or visual representation of the persona—in order to bring the persona alive and spark creativity
- demographic features—such as age, education, ethnicity, and family status
- a description of individual's needs, behaviours and feelings about the subject in question
- a description of the individual's wider aspirations, strengths and motivations
- information on the individual's physical, social, and technological environment
- a quote that sums up what matters most to the persona as it relates to your project.

Personas should be realistic enough to make your team feel like they 'know' that user. Don't worry if this does not happen immediately—it will develop and deepen over the research process, as new insights are gained. You might choose to represent the persona through an illustration, with accompanying images, text or video footage, to help this process and make the personal feel real.

While it may be impossible to develop a persona for every potential user, it is best practice to create multiple personas in order to represent the majority of likely different users. This allows exploration of how users with different characteristics or needs engage in different ways and experience maps or user journeys are likely to be unique for each persona developed. One example of personas that we are especially fond of from the charity sector is the 'scenario' cards from Comic Relief, Snook, Chayn and SafeLives' [Tech vs Abuse](#)¹³ project (Figure 2, page 6).

¹³ www.techvsabuse.info

Figure 2: Scenario cards for the Comic Relief's Tech Vs Abuse project



Source: [Tech vs Abuse](#).

These personas, which are grounded in primary research, describe the lived experience of a range of women, in different stages of abusive relationships—such as pre-awareness, wanting to leave, escaped and in recovery. For Comic Relief, the personas helped ensure that every stage of project research and design was conducted with victims and survivors in mind. It is important to remember that personas are only as good as the research behind them, which is why the user research stage is instrumental.

Step 3: Developing experience maps or user journeys

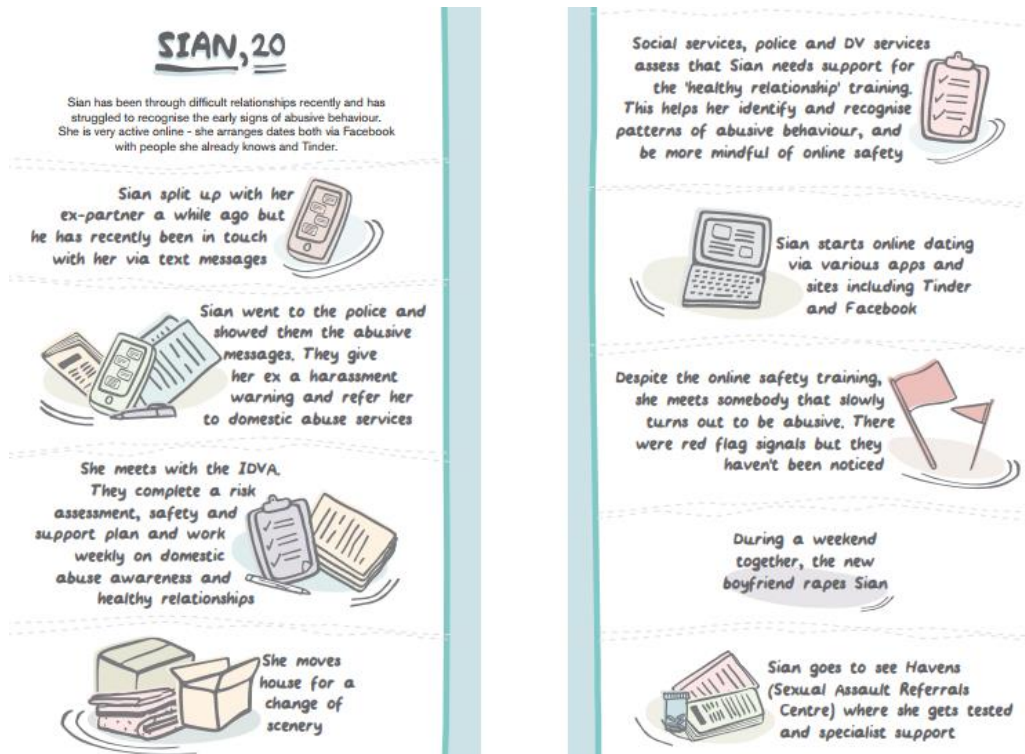
Having defined your personas, you are ready to use the insight you have gained to begin mapping. This process can be undertaken in different ways. In some cases, the team will retrospectively analyse the findings from the earlier exploratory stages to form the experience maps or user journeys. In other cases, they will provide hands-on settings in which to guide users to map their *own* experiences. The latter is our preferred approach as it is more user-led, collaborative and minimises the risk of misinterpretations.

As a team, you are ultimately looking to turn the insight from the user research and persona creation phases into a chronological series of events that tell the story of how each persona reaches a stated goal—be it a referral for mental health support, a session with an employment advisor, or a job offer.¹⁴ Workshops with reams of post-it notes, sharpies and flipchart paper are a good way to get started. Sessions that are run with users themselves are another opportunity to strengthen your understanding of your users. You should record their thoughts, feelings, behaviours and so on with regard to the issue at hand as you work together to map their experiences. This process will likely be messy, with post-it notes, and arrows being moved all over the wall or flipchart. We find it valuable to document this thinking process, as well as the end result, by taking pictures throughout. Taking pictures also helps when you have to visualise them after the workshop. Once you have developed experience maps or user journeys that you feel are fair and accurate representations, you need to sense-check them with your users, listening to their comments and making changes accordingly. It is essential to ensure their voices are accurately represented within these maps.

Tech vs Abuse's experience maps show the lived experience of each of their personas working towards various goals (Figure 3, page 7). In the example below, Sian's goal is to access specialist support.

¹⁴ <https://webdesignviews.com/step-step-guide-creating-effective-user-journey-maps/>.

Figure 3: Experience maps from Tech vs Abuse



Source: [Tech vs Abuse](#).

An optional final stage of the process is to create a single map that takes learning from each of the individual experience maps or user journeys developed for the personas. In some projects it may be useful to have this top-level overview (Figure 4, page 10). However, in others it may not be necessary or appropriate because users' experiences are so varied that a standardised 'one fits all' experience map does not add value. If it is decided that a single map should be developed, it will also need to be sense-checked with your users, and amended based on their feedback.

Step 4: Learning from your user maps

So, now you have developed a set of (or a single) experience maps or user journeys. They look great, and you have had a lot of fun and learned a lot in the process. Now what?

It is time to reflect and, most importantly, *use* what you've learned to inform your work going forward. Ask yourself:

- What have you learnt about your users that you didn't know previously?
- What are the key themes of their experiences that you have identified? This could include interactions with particular services/products/organisations which may be influential or pain-points.
- Are there any areas where you have identified gaps? For example, were there areas where users noted they struggled to find or access a product, service or organisation to meet their needs?
- What can be done to rectify these gaps and improve the experience and impact on the user? Is this something your organisation is in a place to provide? If not, could you share this finding with any relevant organisations who may be able to meet this need?
- Are there any areas where you have identified duplication? For example, have users reported a lot of time is lost due to their personal information existing in silos? Did they say that each time they have a new support worker or case worker they need to explain their situation from the start?

What can be done to rectify the duplication and improve the experience and impact on the user? For example, are there opportunities for collaboration that could be explored? Could systems be more joined up? What would the cost of this be?

- How can you most effectively share the work you have done and learning you have created?
- How can you keep your users involved on an ongoing basis?

The exact questions you ask yourself will vary greatly depending on the aims of the project. However, in all cases the focus should be on learning, challenging yourself and improving the impact and experience for your users. Your experience maps or user journeys are likely to spark ideas for the development of new initiatives, as well as highlighting opportunities for improving existing processes. The extent to which the organisation can act—whether that's by designing, testing, re/developing services or starting to work collaboratively with other organisations—will obviously depend on internal resources.¹⁵ Nonetheless there is a lot for organisations to learn from using these processes to investigate and understand the experience and journeys of their users.

¹⁵ <http://theuxreview.co.uk/user-journeys-beginners-guide/>

Examples of user mapping: NPC's own work

NPC is currently working on two user-led initiatives, both of which involve mapping the experiences of users or potential users to understand their lived experience, and use this insight to guide decision-making.

Project 1: Digital technology in the youth sector

This project, conducted in partnership with [Revolving Doors](#), aims to identify opportunities for digital technology to improve young peoples' experiences of charity and public sector services and enhance the benefit they gain from them.

The project is based in the London Borough of Camden, where we are working with young people who are, or are at risk of becoming, disconnected from employment, education and training (NEET). Many of these young people have lived experience of homelessness, abuse, substance misuse, the criminal justice system and/or the care system.

It is a highly collaborative project and co-creation, listening and learning have been guiding principles throughout.

Step 1 in practice: User research

Over the past three months, we have used focus groups and workshops to better understand the lived experiences of young people accessing government and charity services in Camden. Assisted by charity partners and youth workers, we recruited twenty-three young people for these consultations, plus a steering group of five to guide us throughout the project.

We have worked to build trusting relationships with these young people, meeting in places where they feel comfortable, like youth centres, and making sure they are appropriately reimbursed for their time and expertise.

Together we have explored their strengths, challenges and motivations for accessing public and charity sector services, including the positive things and pain points they have experienced. Each young person we have consulted has given us a fresh perspective and insight into how they engage with public and charity services.

Step 2 in practice: Creating personas

We created initial personas like Anna whilst we were recruiting the user group of young people, and have since updated these as new insights emerged.

Anna, 24: Anna lives at home with her parents, and is trying to get a job so that she can move out. She's struggling to get interviews as she spent some time in prison and employers have told her that they can't progress her application for that reason. This process has had a negative impact on her level of motivation. Although she's made changes since getting out of prison, she is still trying daily to remove the negative influences and relationships from her life, and replace them with more positive ones.

We have maintained frequent contact with the young people and the steering group meet regularly to co-create and review relevant outputs. Through this, we have developed (and continue to develop) a solid understanding of their experiences, needs, behaviours and feelings towards government and charity services, as well as their wider aspirations, strengths, challenges and motivations. We have chosen to use the language of the young people throughout the project, so they identify with the work—'my best life', for example, is their expression of their ambition for the future.

Step 3 in practice: Creating experience maps or user journeys

By identifying the young peoples' goal for the future (of living their 'best life') we then examined how they could achieve this life based on their various starting points. We worked together to map their individual experiences and perceived steps in participatory workshops, identifying services they currently use or wish to use for support.

Figure 4: Experience map from the NPC project *My best life: Priorities for digital technology in the youth sector*, and Shona Curvers, NPC consultant who co-led the sessions



Once we understood their individual experiences in detail, we used subsequent workshops to look for commonalities in experience. We worked to developing a single experience map that considered the perspectives of all of those consulted. Working collaboratively minimised the risk of misinterpretations during this stage. The single map that was developed was comprehensive (Figure 4) and took several iterations of amends based on user feedback.

Step 4 in practice: Learning from the experience map

Now that we have co-created a visual experience map to understand the young peoples perceived steps to achieving their 'best life', we are identifying opportunities to improve charity and public services to ensure there is 'no wrong door' for young people seeking to achieve more fulfilling lives. We are identifying where digital technology can play a role in improving young people's experiences of products and services they need. This ultimately means working to help reduce duplications of effort, to scale and implement promising solutions that are working, and develop new products where there are gaps. Interviews with experts in the youth and digital sectors are supporting this process.

Project 2: Achieving gender equality through digital technology

The second project takes a similar person-centred approach to understand the lived experience of Kenyan and Indian girls and women facing gender inequality. For this project too, we will work collaboratively with a cohort of women and girls to co-create experience maps, specifically focusing on routes to sustainable employment. These experience maps will then be used to learn and identify where improvements can be made, and to inform funding decisions towards initiatives that will have a meaningful and sustainable impact on their lives.

We are currently looking for partners (both domestic and international) who want to work collaboratively on this project so if you would like to hear more, please do get in touch.

What else can be done to make services more user-focused?

Encouraging open source

'Whenever we work with a new charity, we create user personas of who they are trying to reach etc. We have started to share those, with the charities' consent, when there is overlap between the user personas. This stops organisations starting from a blank canvas when they want to look at their users.'

Matt Haworth, Co-Founder and Director, Reason Digital

We would encourage organisations engaging in this type of work to—where possible, and with consent—share their process, the outputs they create and any learnings which would benefit the sector. Many organisations work with the same group of users—either on different aspects of a single problem, or on multiple challenges. So sharing process documents, personas, experience maps, user journeys and 'lessons learned' can help foster progress for the sector and create impact for individuals.

Developing tools for sharing lived experience

'We established something that helps us to capture the conversations that staff and volunteers have with service users and turn that into a gauge of their well-being. That then can be used as a trigger for service interventions.'

Andy Murphy, CEO, Age UK Islington

Some organisations have told us about tools they are developing to capture the lived experiences of service users across organisations, utilising technology to trigger appropriate services based on user feedback. We encourage the sharing of such tools, and their insight, to support more organisations in responding to the genuine experiences of current and/or potential service users.

Promoting user mapping across sectors

'Charities tend to only look at the services they deliver. They seldom look at the full range of services their users need and think about how they could facilitate bringing these together. Eg, by putting them in touch with other organisations who do X, Y, Z. Understanding and mapping their wider experiences and needs is central to this.'

Matt Haworth, Co-Founder and Director, Reason Digital

Experience maps and user journeys are inherently collaborative. This is important, because impact is rarely created by a single interaction or provider. To get a true understanding of users' experiences, organisations that are striving for a common goal or who work with the same set of beneficiaries should work collaboratively to map the true complexity of experiences across services and sectors. This approach is likely to highlight greater opportunities for improvement.

Conclusion

User journeys and experience maps are foundational design tools that we believe the social sector should leverage to develop empathy for, and insight into, the lives of people they seek to support. We perceive great benefits from increasing the use of user mapping techniques, not only in the development of digital products but in the design, evaluation and improvement of all services, products and even organisations. Understanding lived experience is a precursor for creating sustainable impact and we hope that experience maps and user journeys will become commonplace in the sector, just as theories of change have.

Resources and further reading

For organisations interested in learning more about the topics here, the following sources are a useful starting place:

- [The Interaction Design Foundation](#)
- [IDEO](#) and [IDEO U](#)
- [Stanford d.School](#)
- [The Design Council](#)

The following reading may also come in helpful:

- Bonbright, D., Curvers, S., Hestbaek, C., and Lumley, T. (2016) [*User voice: Putting people at the heart of impact practice*](#). New Philanthropy Capital.
- Kalback, J. (2015) [*Mapping-Experiences-Creating-Journeys-Blueprints*](#). O'Reilly.
- Brown, T. (2009) [*Change by design: How design thinking transforms organizations and inspires innovation*](#). HarperCollins.
- Rowe, P. (1991) [*Design thinking*](#). MIT Press.
- Gothelf, J and Seden, J. (2016) [*Lean UX: Applying lean principles to improve user experience*](#). O'Reilly.

We welcome your feedback on this report. Please contact us at [NPC](#) or on [Twitter](#) ([@NPCthinks](#) or [@Rthomasoo](#)) to continue the conversation.

We would like to thank Jan Golding, Experience Director at [Yoyo Design](#) and Jonty Sharples, Co-founder and Design Partner, [Hactar](#) for their time and expertise as peer reviewers on this report.

Thanks also go to our [Supporters Circle](#), whose funding made this report possible.

To find out how you can support NPC's work, please visit our website at www.thinkNPC.org/SupportNPC.



TRANSFORMING THE CHARITY SECTOR

NPC is a charity think tank and consultancy. Over the past 15 years we have worked with charities, funders, philanthropists and others, supporting them to deliver the greatest possible impact for the causes and beneficiaries they exist to serve.

NPC occupies a unique position at the nexus between charities and funders. We are driven by the values and mission of the charity sector, to which we bring the rigour, clarity and analysis needed to better achieve the outcomes we all seek. We also share the motivations and passion of funders, to which we bring our expertise, experience and track record of success.

Increasing the impact of charities: NPC exists to make charities and social enterprises more successful in achieving their missions. Through rigorous analysis, practical advice and innovative thinking, we make charities' money and energy go further, and help them to achieve the greatest impact.

Increasing the impact of funders: NPC's role is to make funders more successful too. We share the passion funders have for helping charities and changing people's lives. We understand their motivations and their objectives, and we know that giving is more rewarding if it achieves the greatest impact it can.

Strengthening the partnership between charities and funders: NPC's mission is also to bring the two sides of the funding equation together, improving understanding and enhancing their combined impact. We can help funders and those they fund to connect and transform the way they work together to achieve their vision.

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