



# USER JOURNEY

A user journey is a powerful tool to scope the problem identified and hence to understand where to focus efforts.

The user journey helps you and your team to empathise with - and better understand - how a representative of a specific stakeholder group is currently addressing the problem. Such a stakeholder representative could be a person of a certain vulnerable group or a health clinic professional in a community we support.

By mapping each step taken, current pain points experienced are uncovered. This will guide you on where to focus efforts and thus scoping how to address a given problem.

A user journey is particularly relevant in the beginning of the project cycle when seeking to identify the most relevant problem or opportunity to address. But it can also be effective during design or even implementation to evaluate whether your chosen solution (e.g., a service) offered needs to be modified.

To use this tool, a [persona](#) must be developed first.

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## Step 1

### Zoom in on a scenario

Agree in the team on what scenario - what part of a given challenge - you want to understand better for your user journey. This can be the part where you see most potential for impact if addressed. You can make several user journeys if there are several parts of a challenge you want to understand better.

*For example, if seeking to understand how to address the challenge of ensuring continuity of care for a specific patient group, zoom into where you have assessed the biggest problem to be, e.g., adherence to treatment if access to health facilities is often obstructed.*

*For example, if you would also want to understand what the same patient group does to prevent their disease to worsen.*

Note the chosen scenario you want to address for this exercise on the map.

This will inform which persona [link to the persona tool] you will make the user journey for. A "persona" is a holistic fictional, yet representative, archetype of a given stakeholder group used to personify needs and desires to help gain empathy and a better understanding of the group to enable better design.

*For example, the persona could represent men 40-60 in X setting with Y disease.*

**Face-to-face:** Print the user journey template in A3 and distribute one copy per group. If you can't print, draw it out. If a group more than 8, split into smaller groups to discuss which scenario to focus on. Come back in plenum after an appropriate amount of time to consolidate and agree on a scenario.

## INFORMATION

**PHASE**  
EXPLORE

**TIMEFRAME**  
60-120 MINS.

**MODE**  
BOTH

**PARTICIPANTS**  
2 - 10+

**FACILITATION LEVEL**  
MEDIUM

**MATERIALS**  
PRINTER, A3 PAPER (IDEALLY)  
MARKERS AND STICKY NOTES  
TIMER

**Online:** If more than 8 people, use breakout rooms to fill out the map. Each group with their own board. Use the template made and copy to ensure there is a board for each group. If a group more than 8, split into smaller groups to discuss which scenario to focus on. Come back in plenum after an appropriate amount of time to consolidate and agree on a scenario.

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## Step 2

### Add the persona

Fill out the box 1 on the persona. As you will have made a [persona](#) before this user journey, you will just take the key points from the persona and fill onto this user journey map.

In the team discuss and agree on what goal the persona has in relation to the chosen aspect of the problem. What does the persona want to achieve?

*For example, the persona would like to get the proper treatment easily and at a payable price.*

Note down the goal of the persona on the map.

#### **Facilitators tips**

*Remind the team to be aware own bias, position and pre-existing knowledge when developing the user journeys. If possible, make the user journey with representatives from the stakeholder group in question to take part in the exercise to get a more accurate result. If doing so, be aware of your position and what expectations that might create when reaching out to communities and partners. Be very aware that additional considerations, sensitiveness and care apply if this exercise is considered to be conducted with children and vulnerable groups. If it is assessed that it is not ethically right to do this exercise with the vulnerable target group of interest, proxy participants who have an in-depth knowledge of the target group can be consulted instead.*

**Face-to-face:** If a group more than 8, split into smaller groups to fill out the map. Print the user journey template in A3 and distribute one copy per group. If you can't print, draw it out.

**Online:** If more than 8 people, use breakout rooms to fill out the map. Each group with their own board. Use the template made and copy to ensure there is a board for each group.

Now it is time to start the mapping, by moving through the boxes 2 – 7

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## Step 3

### Fill out the user journey map

Now it is time to start the full hypothetical user journey mapping, by moving through the boxes 2 – 6. If you do not do the mapping with representatives, the assumptions made while making the user journey map will need to be validated afterwards. The more accurate the map is, the better the design of your proposed solution will be.

Add more columns to the template if needed to describe the experienced process! If not, you are ready to go:

- **Box 2:** Identify the process the persona goes through when addressing a challenge or completing a task. Break that process down into the main phases the person would go through.

*For example: adherence to treatment is obstructed, due to obstruction of access to the preferred health facility. "The process" describes what the persona, representing a given stakeholder group, likely does to deal with the situation. This process is then divided into phases which could be: phase 1) the point of when the persona discovers the preferred facility no more provides the necessary treatment; phase 2) the persona's immediate way of dealing with this situation is to see if s/he can manage without the treatment; phase 3) The persona tries to get referred to another place; phase 4) a referral is granted but the facility is quite far away and not easy to access.*

- **Box 3:** Define the steps your persona takes in the respective phases identified above.

For example, in the phase that the persona discovers the preferred facility is no longer accessible, actions may be: that for step 1) the persona first asks other community members what to do, then; step 2) the persona do not take any concrete actions but instead carries on as normal to see how it will go without treatment; step 3) goes to the local health facility to understand what to do, then; step 4) the persona found the information from the local health facility a bit confusing and now wants to understand if the new facility indeed can provide the right treatment, where the new facility is and how to get there.

- **Box 4:** Describe the pain points the persona faces, when carrying out the steps identified. Seek to concretely understand what challenges them and what feelings they experience.

*For example, in step 1 described above, the pain point could be: that the persona had saved money to go to the clinic and is frustrated that the money is wasted. At the facility the persona gets contradicting information of what to do and thus feels confused; In step 2 the persona is feeling increasingly worse and feels the lack of treatment, other alternative remedies are not working, and it is now starting to reduce the persona's ability to work; In step 3, the persona travels to go to the local health facility, which costs money and is cumbersome. Still the persona does not get a clear answer of what to do; In step 4, the persona seeks advice on how to understand the information from the local health facility. The persona cannot find good information about the new facility and is in doubt of whether to travel all the way to it, as it is very far away. The journey to the facility is very costly and will take a full workday, which means loss of income.*

- **Box 5:** Define the people influencing the persona's decisions and actions.

*For example, in step 1 it could be that both the persona's spouse and the local healer has each their advice of how the situation could be dealt with; In step 2, it may be a friend of the persona or a colleague saying that they know of other people with similar disease who was fine without the treatment, but instead changed their diet; In step 3, it might be the spouse of the persona convincing the persona that something must be done to get back on treatment; In step 4, it may be the an old friend or a local volunteer helping the persona in understanding the information from the local facility and trying to find out more about the new facility.*

- **Box 6:** Define which social determinants that are at play influencing the personas decisions.

*For example, in step 1 the persona had money set aside for the visit, it was planned with work and there is encouragement from personas close network to go; In step 2, economy plays a role, as the persona is happy to safe money on the rather expensive treatment; In step 3, also in this step in is the supportive network that is making a difference; In step 4, both the close network and*

broader community is of help to the persona to go to the clinic despite it being far away.

### **Facilitator tip**

*If the team has been working with the chosen stakeholder group(s) for long, it can be tempting to think that all is known. Therefore, when conducting this exercise, challenge participants' prior knowledge by asking how they know X, Y, Z and probe for blind spots and bias encouraging the use of data. If the team is split into smaller teams, one or some in the team can play the devil's advocate.*

**Face-to-face:** If a group more than 8, split into smaller groups to fill out the map. You can afterwards consolidate the findings in plenum. If you are covering more user journeys to understand different aspects of a problem, you can take one aspect per group and follow same process as described in this exercise.

**Online:** If more than 8 people, use breakout rooms to fill out the map. You can afterwards consolidate the findings in plenum. If you are covering more user journeys to understand different aspects of a problem, you can take one aspect per group and follow same process as described in this exercise.

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## Step 4

### **Consolidation and validate**

Review the entire user journey(s) together. If split into smaller groups or breakout rooms, come back together and consolidate the user journey(s) and consolidate all into one user journey map. This is done 'per aspect' if more user journeys were done to capture different aspect of a given challenge.

Identify unknowns and areas of uncertainty within the journey. What do you need to validate?

Plan how you will research these unknowns and uncertainties with the stakeholder group(s) in question to further deepen understanding and qualifying decision making.

Make sure to specifically outline who will do what when, so the next steps are clear.

Keep refining the user journey map(s) until you can prioritise key decisions on how to proceed to address the problem or modify a solution. Use the map(s) as a dynamic tool(s) as part of you design and implementation process.

### **Facilitator tips**

*When planning the next steps ask the group how the missing data can best be found. E.g.: Is some data already existing, so communities do not have to be asked again? Can the data collection be part of other planned activities? Is there someone in the team who are better positioned to validate certain data points?*

**Face-to-face:** Stay in plenum to consolidatate and validate.

**Online:** Stay in plenum to consolidatate and validate.

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## Step 5

### **Insights, opportunities and next steps**

Based on the mapping exercise, it is time to discuss:

- What insights you as a team have gained making the map and how they affect your intervention?
- What new opportunities to address the problem do you as a team see based on the insights gained? E.g., New potential modes of interventions, new partners needed to design and implement potential solution? Should a different setting for the potential solutions to the problem be considered?

Wrap up the exercise by discussing and agree on next steps to advance with the design of your solution.

Make sure to specifically outline who will do what when, so the next steps are crystal clear.

**Face-to-face:** If more than 8 people, split into pairs or smaller groups to discuss the insights, opportunities and needed next steps. Come back in plenum to consolidate and agree on the next steps.

**Online:** If more than 8 people, split into pairs or smaller groups to discuss the insights, opportunities and needed next steps. Come back in plenum to consolidate and agree on the next steps.