

# Visualize the User Journey

## Setup for Success

Before you begin, reflect on the objectives of the exercise:

- Visualize the user journey through your Coordinated Entry System (CES).
- Identify key stakeholders in the community that need to be brought into the work.
- Identify at least 1 primary system barrier your team can focus on solving for **today**.

Decide where to make your map

- Use our mural template below.
- Use your wall! Whiteboards, flipcharts, or butcher paper work great. We recommend using post-it notes so that you can move ideas; you'll be glad for the flexibility.

Pick a population

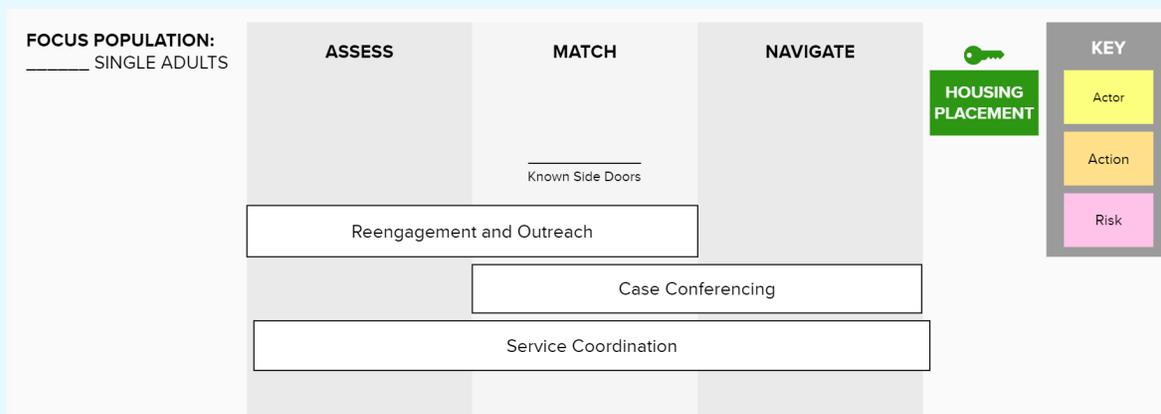
- Fill out the map for a specific (sub)population. A veteran housing process map will look different than a chronic homelessness process map, etc. Don't try to boil the ocean by mapping your entire system at this level of detail!

Draw the phases of your housing process

- We label them Assess, Match, and Navigate. Customize them to fit your local model and lingo. If you've created process "buckets" in your BNL, you might use those here.
- Stretched across the bottom of the phases are action bands: Reengagement and Outreach, Case Conferencing, and Service Coordination. Use these action bands to indicate where clients are addressed by your staff.

## Shift Lab Process Map Template

Click on the diagram and follow the link to access the template.



## Facilitation Flow

### Draw the phases of your housing process

- Think in terms of *Actors* and *Actions*.
  - For *Actors*, add the organizations who take action. Think from the client's perspective: Who are they talking to? After completing a column, indicate the actor who handles the most volume in that phase. (Tip: Outline the post-it note, or place a sticker on it.)
  - For *Actions*, think about processes that happen administratively, or behind the scenes. Think from a staff person's perspective: Who's inputting data? Who's emailing who? What meetings, handoffs, forms, and procedures happen invisibly to the client?

### Adding Length of Time Measure

Consider this a bonus step; it's important, and it's OK if you're not ready to do it today. In between phases, write the average length of time it takes for a client to move from one phase to the next. Refer to data from your BNL or HMIS. Look across your map and indicate the 3-5 actions that take the longest time. Don't worry yet about how to change them; the task at hand is to find opportunities.

Starting at **Assess**, use open-ended questions to help the team identify the process by which people are first flagged in the system.

- Identify where users are first interacting with the system.
- Document who is conducting assessments, and through what process.
- Note at what point someone is added to the By-Name List (BNL).

Use the **Match** section to identify how clients get enrolled in a program.

- Document how prioritization is determined: through CES, or otherwise.
- Document how vacancies are being identified.
- Document how agencies are receiving referrals.
- Determine if there are known side doors into the system, such as a program that houses clients without them ever being added to the BNL.

Under **Navigate**, list out the process by which clients identify and view rental units.

- Determine if each agency does their own housing navigation, or the clients are expected to find housing on their own.
- Determine if appropriate housing vacancies are available, regardless of accessibility or other requirements.

## Analyze the Map

Now that you have a beautiful, pristine process map, mark it up! Circle problems, draw opportunities, and imagine versions of it that would serve clients better. Here are some sample questions to help you analyze the process you've visualized.

- Which moments depicted in this process might create a nice moment for a client? Which parts do we think are a client's least favorite?
- If someone experiencing homelessness saw this map, which parts would they happily pay us to do? Which parts would they absolutely not pay us to do?
- If you could wave a magic wand and change something, what would you pick? How would that change bring your system closer to ending homelessness?