

UXPRESSIA

CASE STUDY

Using customer journey mapping to help a charity transform internal processes

StepChange
Debt Charity

CASE OVERVIEW

Redesigning long-established processes and changing ways of working is not what everyone expects from an organization that is already a leading expert in its field. But that's what a debt charity is doing right now, pursuing its noble aim of helping more people find a solution to their debt problems.

Here's how StepChange Debt Charity is transforming its internal processes with the help of customer journey mapping and the UXPressia software.



ABOUT STEPCHANGE DEBT CHARITY

[StepChange Debt Charity](#) is the UK's leading debt charity and provides free debt advice and debt management help to individuals and families over the phone and online.

It provides advice and support to people in financial difficulty, helping them overcome their debt problems and achieve long-term financial control.



StepChange
Debt Charity

Industry: Non-profit (debt charity)

Founded: 1992

Headquarters: The United Kingdom

Number of employees: Approximately 1,500

Type: Privately held

Yearly number of clients: 650,000

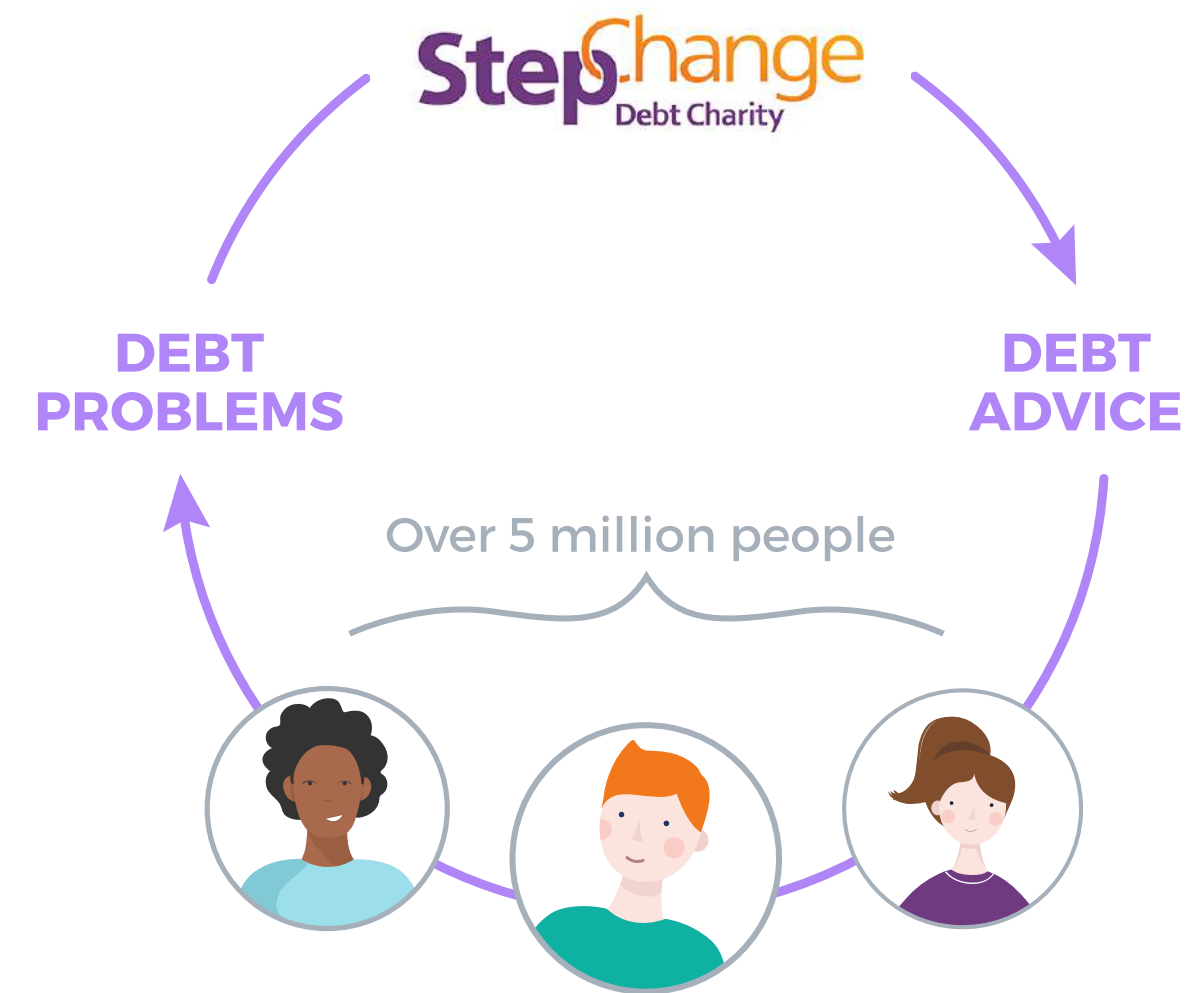
INITIATING THE CHANGE

Every week, thousands of people from England, Wales, Scotland, and Northern Ireland contact StepChange Debt Charity to get advice on their debt problems.

The organization was established with a simple vision: no one should have to pay for debt advice. Since its founding in 1992, the organization has been bringing this vision to life. To date, StepChange has helped over 5 million people get their finances and lives back on track.

With the results being nothing short of impressive, the debt charity has every right to rest on its laurels, following working practices established over decades of professional service. But StepChange has a different opinion, aiming to reach new heights.

Its ambition is to double the number of people it helps in the next few years. And that will be an important milestone on its way to the ultimate goal of creating a society free from problem debt.



The charity realized that it could succeed in this endeavor only by transforming its ways of working — along with the systems and processes that support them — to be able to serve more clients.

The charity's UX team has been at the heart of the process from the very beginning. Persona-based customer journey mapping has been instrumental in helping internal teams to get on the same page about the real needs of their customers and switch from “inside-out” to “outside-in” thinking.



“We’ve often viewed things from an internal perspective in the past,” says Tamzin Ward, UX Designer at the charity. “Customer journey mapping helps us understand what clients might be going through in reality and how they are feeling.”

Explaining the value of maps and personas turned out to be the easy part. The biggest challenge that the UX team faced was achieving consistency in formatting to ensure that everyone would easily recognize the document type.

“*Having something that's repeatable and consistent is helpful because people start to recognize and remember it.*”

Another goal was to simplify and streamline the document creation process. But that all was impossible until StepChange discovered UXPressia.



A photograph of three people (two women and one man) sitting around a wooden table, smiling and looking at a tablet and a laptop. The tablet displays a complex diagram with nodes and arrows. The man is wearing glasses and a denim jacket. The woman on the right is wearing a red shirt. The woman on the left is wearing a white sweater. There are glasses of water and a brown folder on the table. The background is a textured wall with some plants.

ONE SOLUTION TO ALL PROBLEMS

Everyone in the UX team had tools and templates to create customer journey maps and personas, but they weren't necessarily aligned, so documents often didn't have the same structure and layout.

“We needed a tool to be used by everyone in the team — something a lot more visual and engaging than we had at the time.”

One day back in 2019, they tried UXPressia and have been using the tool ever since.

“I love the ease of use, the speed, and the fact it's web-based. And that it saves everything I do automatically without even asking.”

Building maps and personas ensures the necessary consistency in formatting: the documents look alike; they have the same structure and are branded the same.

“People recognize what they are because they are in the same format.”

With the tool, the UX team at StepChange can focus on what's really important — the content.

“I don't waste loads of time any more creating something from scratch.”

UXPressia has become the hub for all the customer journey mapping projects within StepChange's UX team.

“It's great to have everything in one place. We all are assigned to different projects, and I like that I can open the workspace and see all the maps and personas that we created, duplicate them, and add new versions of the same document.”

The tool makes it easy for the UX team to collaborate on maps and personas, share them with product owners and other colleagues, send exported files to others as attachments, present maps and personas on the screen, and print them to use as handouts during workshops.



IT'S ONLY THE BEGINNING

The transformation process is still in progress, and the UX team is there to assist StepChange in putting user-centricity upfront.



“We keep on raising awareness about the methodology and related processes among colleagues who don't have customer journey mapping on their radar yet. Working like this is really helping us put users at the heart of everything we do,”

Tamzin Ward, UX Designer at the charity.

Thank you

Get in touch with us to start your journey with UXPressia.

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We are looking forward to having you aboard!

