The use of Prezi for customer journeys and customer service excellence

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As part of Leeds Metropolitan University Libraries and Learning Innovation's (LLI) commitment to customer service and the revalidation of its Customer Service Excellence (CSE) award, we were looking for a new way to present the 'customer journeys' that customers take when using our services. Customer journeys are defined as 'a method of identifying the key processes that the customer encounters when they interact with the organisation' (Customer Service Excellence, 2012a.) We wanted to use these journeys to aid our insight into our customers and how they used LLI, and in turn use this information to underpin our service provision.

We decided to look at four key areas and relate each of them in turn to different types of LLI customers; for example, international students, postgraduates, disabled users and students in schools / faculties.

These areas were:

- What we already know about our customers
- What services are currently on offer to them
- Feedback from our customers about the services they received
- Any changes planned or made to services as a result of this feedback

Why Prezi?

We were aware that we had a considerable amount of data to include in these journeys and wanted to find a resource that would enable us to present the information in a way that would reduce information overload, but still ensure a comprehensive presentation.

After considering a number of applications, including Inspiration and PowerPoint, the decision was taken to use Prezi, a cloud-based presentation software. Originally developed by Adam Somlai-Fischer as a tool for use in architecture, unlike more traditional presentation software such as PowerPoint where the user moves from one slide to another in a linear fashion, Prezi can be used to produce a non-linear presentation. This is achieved by placing data onto the Prezi 'canvas' and through the use of various tools the user is able to move between ideas and highlight key elements. We felt that this would help us to draw clearer links between the four areas we wanted to address, thus helping us to see the whole picture when necessary while still enabling us to focus on the details, and so highlight similarities and differences in use of our services.

HOW WAS IT USED?

We used the Prezi tool 'frames'; these are literally a means of drawing a frame around groups of data, to group the four key areas of information together. The type of data included varied between the different areas, but included management data taken from other service areas, such as student numbers and modes of study. We also included data from the library management system, library web pages, disability services, the study skills service (Skills for Learning) as well as feedback in the form of the National Student Survey, the Postgraduate Survey and the International Student Barometer.

An additional aspect of the frames is that they work as a means of determining which aspects of your presentation the viewer is able to see at any one time. This meant we were able to discuss each of the four key areas in turn, without displaying too much information and 'overfacing' the audience.

An advantage of using Prezi was the ease with which we were able to add data, simply by typing directly onto the canvas or by using the 'bubble menu' to import images, videos or documents. This meant we could easily import graphs, library guides, maps or web pages ready for editing.

Once the data were placed within the frames, we were able to start using some of the fun elements of the Prezi tools. We used the 'zebra' editing tool; literally a circular striped tool that enables you to rotate your data, resize it, move, zoom in and out, and change the colour or font to start manipulating the information. We were able to zoom and

Bubble menu

resize objects to 'hide' graphs within graphs and add additional data to imported web pages, text or images. We could show the library web page for international students and zoom in to reveal details of the number of hits on that page in the last year, or the most downloaded guide. These details were placed in hidden frames that do not display in the final presentation, which meant that the 'hidden' data were not obvious to the viewer, so were revealed only when we zoomed in. It also helped us control exactly what was viewed and enabled the software to know what we wanted to highlight when we created our 'Prezi path' (the link that shows the order in which you want different aspects of your Prezi to display).

Zebra editing tool

The other advantage of the frames was that as well as grouping our data they enabled us to control the data within that frame, so we could move it *en masse* or resize it. It is, however, worth noting that hidden frames do not conform to these rules and don't move with the frame when you drag it, and you can sometimes find you have lost some of your data (especially if it has been 'shrunk') somewhere on the canvas! To avoid this, you can

hold down the shift key draw a border around the whole frame, and then all the data including all the hidden frames will all move as one.

As Beecroft (2012, p.16) states, Prezi is 'an incredibly visual medium': once you have your data on the canvas, the very nature of the software makes you think about it in a different way. It was thus an ideal means of presenting our data to the CSE assessor and helping us to think about it in a different way, so that we could ensure that it kept the audience engaged and remained relevant, interesting and informative.

How were the journeys used?

The completed journeys were shown to each of the relevant departments or services, such as the academic librarians for a particular faculty, and the off-site team – the off-campus learning support service for students who are rarely or never required to be on campus. Feedback was gathered from the viewers and changes were implemented where possible. This helped to achieve an objective LLI had set in its annual plan for 2011–12, i.e. to increase the usage of management data to inform practice. By using Prezi we were able to make the data easier to digest and bring the data and the customer together, thus placing the focus on the customer rather than the data. The completed journeys were then submitted as part of our evidence for revalidation in our CSE award.

We were really pleased when we were granted the CSE award with full compliance following our reassessment. It was also rewarding to note that the assessor gave one of our seven compliance pluses in the area of customer insight, noting the extent, range and innovative approach we had brought to our customer journey mapping.

Moving forward

Since the completion of the journeys we have continued to use them as a means of assessing our services. They have highlighted a number of areas for improvement and possible developments including:

- to increase the feedback from specific groups, for example the off-site service for distance learners
- to add to our existing 'essential' library guides, for example for postgraduate students

- to explore new ways of gathering feedback from hard-to-reach customers and alternative formats for feedback

Presenting the customer insight journeys to the relevant services also enabled us to look again at the information we had put in the journeys; this supported the ethos of 'customer insight', in that it is 'not just about being able to collect the information; it's about having the ability to use that information' (Customer Service Excellence, 2012b); it also helped us to realise that different styles of journey may be more appropriate for different forums:

- The academic librarians may not need the same detail as the CSE assessor.
- What elements could be removed or replaced?
- What links or commonalities can we draw from the use of LLI services by particular groups and how can we use that data to improve their experience?

A final development was the creation of a 40-minute training session for LLI staff on the use of Prezi, highlighting some of the benefits and possible pitfalls in the use of the software.

For further information, or to view some of the completed 'customer insight journeys' please contact Jenny Morgan j.e.morgan@leedsmet.ac.uk

References

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