Personas & Journey Maps: The Definitive How-to Guide for Healthcare Providers
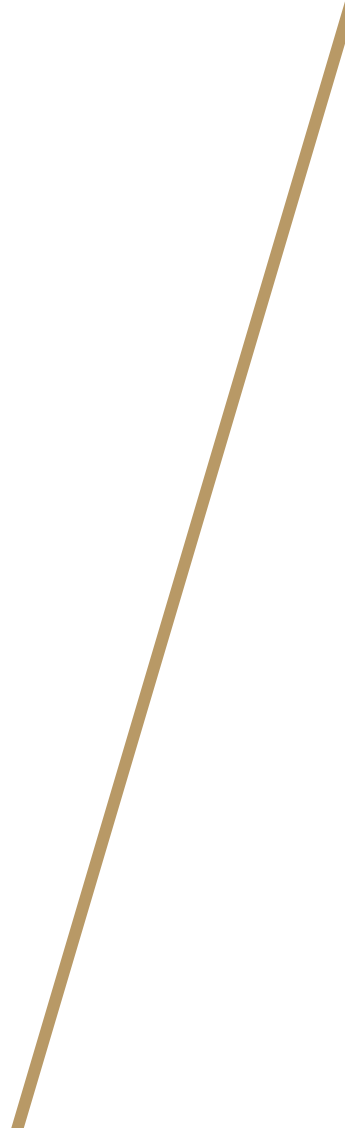
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Contents

Healthcare is undergoing a retail revolution as businesses like Amazon, CVS, Walgreens and others increasingly disrupt how patients receive care. Patients, in turn, expect greater ease and transparency in healthcare, and they're exercising their rights to choose the health systems that provide the greatest ease in navigating their healthcare needs.

How can you, as a healthcare provider, make it easier for your consumers to navigate their healthcare journey?

In our work with the country's largest healthcare organizations, we've witnessed how building healthcare journey maps can be an eye-opening experience. Through this mapping process, organizations gain insights into the breaks in their systems, hand-offs that don't go as intended, and interactions where users ultimately drop off, potentially going to competitors.

This guide offers practical, actionable ways to discover more about your healthcare consumers, ease their healthcare journey and, in doing so, strengthen their loyalty to your brand.

Intro

Your Healthcare Audience: Patient, Consumer, or Human?

Your Guide to Healthcare Personas

Understanding Healthcare Journey Maps

Get Started Building Healthcare Journey Maps

How Perficient and Acquia Can Help

Your Healthcare Audience: Patient, Consumer, or Human?

Healthcare marketers used to discuss the "patient experience" within their health system. More recently, however, the focus has shifted to the "consumer experience," and the reason why is obvious: retail giants keep pushing deeper into the healthcare space, and they're bringing retail practices and improved consumer experiences with them.

Before a person becomes a patient, they are a consumer shopping around as they do in other sectors, looking for the best healthcare option. But even before they are consumers, they are humans – individuals with unique motivations and challenges. They don't just follow doctors' orders, they act according to deeper internal impulses.

Patients are multi-dimensional: patient, consumer, and human all wrapped into one. But they're human first.

Let's break down the difference between patient, healthcare consumer, and human through two example journeys: receiving a breast cancer diagnosis and experiencing a sprained ankle.

Journey	Breast Cancer Diagnosis	Sprained Ankle
First, weighs the human questions:	Am I going to live? How am I going to care for my family, pay the bills, etc. during treatment?	Why did this happen to me? Am I going to be able to do my favorite activities tomorrow?
Next, considers consumer questions:	Where can I find the best doctors/treatment?	Where do I go to get this fixed? How much will it cost?
Eventually, contemplates patient questions:	Where can I find the most advanced technology and clinical trials?	How long will it take to heal?

Human first. Then consumer. Finally, a patient.

Patient-Centric Care

Every health system aspires to offer "patient-centered care" focused on improved quality and outcomes. When care is connected, patients do better, so this gets at the very mission of the health system.

Many studies conclude that patients who are engaged in their care and with their care providers have better health outcomes.

Patient-centric care is largely clinician-driven: "How can clinical and operational services better serve patients?" And while it ultimately benefits the patient, the patient often doesn't understand it or see it soon enough for it to impact decision-making.

Patient-centric care includes things like:

- **Multi-Disciplinary Clinics:** Where newly diagnosed cancer patients can see all the specialists they'll need in one appointment, rather than in five separate appointments

- **Patient Education Materials:** Such as wound care instructions, chronic condition care, and management

- **Discharge Instructions:** To help patients understand the next steps to take

- **Family Caregiver Involvement:** When loved ones are involved, patient outcomes are better

Intro

**Your Healthcare Audience:
Patient, Consumer, or Human?**

**Your Guide to
Healthcare Personas**

**Understanding Healthcare
Journey Maps**

**Get Started Building
Healthcare Journey Maps**

How Perficient and
Acquia Can Help

Consumer-Centric Experience

A consumer-centric experience helps patients understand and choose the right care. It's about engaging patients throughout their healthcare journey (not just for episodic healthcare needs) and considers that patients make their decisions based less on quality measures and more on ease/convenience and emotional considerations such as, "Who feels like a truly trustworthy healthcare advisor?"

A consumer-centric experience includes things like:

- **Ease:** Structure digital processes and content around the patient journey, which includes providing robust find-a-doctor data and taxonomy, clear paths to alternative care options like virtual visits and urgent care, online scheduling and intake forms, appointment reminders, and any functionality that helps patients easily take that next step.

- **Nurture:** Develop a relationship with the patient beyond episodic visits, which includes building proactive outreach ("If I'm this age, this gender, and have these underlying conditions, tell me what's most important to maintain health and wellness.").

- **Transparency:** Healthcare purchases are particularly convoluted; as patients continue to assume greater financial responsibility for their care, they increasingly expect cost transparency.

- **Customer Service:** Offer feedback channels, respond to concerns, and resolve issues in the channel of their choice.

- **Value Propositions:** Help consumers understand why one option is better than another and why they should choose you over the competition.

Human-Centered Empathy

Being "human first" means remembering the people who are your patients, acknowledging their emotions, and considering their larger motivations and challenges. Health goals, after all, are based on larger – human – motivations. People don't want to be healthy for the sake of being healthy, or because the doctor said to – they want to be healthy so that they can be with family and friends, do the things they love, and enjoy life's moments.

But you also must counter unique human challenges. Humans are creatures of habit, influenced by our social and physical surroundings and with different inborn biological tendencies.

Being human-first should show up everywhere in healthcare – in person-to-person interactions, in the tone you use, and the imagery you share.

Here are two concrete examples relevant to healthcare marketers:

1. **Adherence to Medical Protocols:** Healing from a health issue or managing a chronic condition isn't always about knowing the facts; it's about overcoming challenges and creating new habits. It's about finding motivation to take the difficult steps in making a change. Focusing on the facts won't get through to the human. Instead, focus on the larger motivations that are the true reasons a person might want to create change.

2. **"Stickiness" or Brand Loyalty:** What do people love most about your health system? Is it the doctors, nurses, valets – the human connections? It's certainly not the incessant forms, the sterile environment, and the deeply confusing processes. So, the question becomes this: how can you provide more of what is good, beautiful, and human in the healthcare experience and turn it into a larger brand connection? How can your health system apps bring personalization and connection to the healthcare experience?

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Patient. Healthcare Consumer. Human.

You need to be conscious of these differences because ultimately healthcare is about humanity, making people feel better, recover from sickness, and enjoy wellness. Health systems must transition from tactical fixes and individual care encounters to a holistic patient and consumer experience that focuses on the human.

The different stages and touchpoints in a patient and consumer journey need to be better connected across all channels. This requires breaking down the silos that exist between clinical services and across hospital departments (clinical and non-clinical).

In other words:

- ✓ Patient-centric care can't belong to just clinicians

- ✓ Consumer-centric experiences can't belong to just web and marketing

- ✓ Everyone needs to understand that patients are humans first

Intro

Your Healthcare Audience: Patient, Consumer, or Human?

Your Guide to Healthcare Personas

Understanding Healthcare Journey Maps

Get Started Building Healthcare Journey Maps

How Perficient and Acquia Can Help

Here's how marketing and digital teams can help their audiences navigate the patient-consumer-human experience:

- **Own the Voice of the Consumer:** Keep the focus on the patient journey, break down the gaps between touchpoints, and address miscommunication during hand-offs. When there's pushback on issues, bring it back to the healthcare journey.

- **Focus on the "Attract-Serve-Engage" Model:** Digital properties like a website should attract patients, but they should also guide and engage the patient through and after treatment. Attract is mostly consumer-centric, serve is patient-centric, and engage is mostly human-centric, but they're all interconnected.

- **Be Actionable:** Digital functionality and content need to be increasingly actionable. Consumers aren't just seeking information; they want to act. Make the next steps clear and easy.

- **Be Present:** You are the patient's, consumer's, and human's trusted advisor – be there for them.

Intro

**Your Healthcare Audience:
Patient, Consumer, or Human?**

**Your Guide to
Healthcare Personas**

**Understanding Healthcare
Journey Maps**

**Get Started Building
Healthcare Journey Maps**

How Perficient and
Acquia Can Help

Always Human-First

Healthcare marketers need to focus on the patient experience and healthcare consumer experience but must also remember, first and foremost, that we are all humans. Ultimately, being human-first means focusing on the healthcare journey and healthcare personas – the actual people who use your health system.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Your Guide to Healthcare Personas

Do you wonder why patients don't engage more with your website? Why they download but never use your app? Why they didn't react to your campaign? Consider this: perhaps the experiences you're building aren't addressing your audience's true concerns or emotions. Through our work with health systems around the country, we see this disconnect often.

Our suggestion: Before you invest in digital solutions, create robust healthcare personas.

Why Should I Build Healthcare Personas?

Personas help you discover, focus on, and showcase your audience's motivations, challenges, concerns, and behaviors. Personas highlight the decisions consumers make so that you can build structures, processes, designs, and content that resonates with them.

Healthcare personas can be used as the foundation for healthcare journey maps.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

But I Know My Audience! Why Do I Need Personas?

If you work for a healthcare organization, no matter how empathetic you try to be, healthcare is now routine. The result? You often overlook the complexities and emotional backdrop of healthcare.

No judgement here. It's simple psychology. Our brains are wired to disregard unnecessary background noise, literally and figuratively. We tune out ambient noises like traffic or chatter so we can focus on the task at hand. But when that noise is brought to our attention, we hear it clearly again.

In other words, you think you're tuned-in to your audience. But chances are you're not viewing through their lens:

- **You:** Have a reasonably clear understanding of the healthcare process

- **Healthcare Consumer:** Doesn't "get" the process because, let's face it, it's convoluted

- **You:** Know when a patient should be considering a specific healthcare next step

- **Healthcare Consumer:** May or may not know, but regardless isn't going to act on that information until emotionally ready to do so

Without meaning to or realizing that you're doing it, you begin to build and design and write for yourself, not your audience.

What's the Difference Between Marketing Personas and User Experience (UX) Personas?

There are two primary types of healthcare personas, each with different goals.

Marketing personas define broad audience demographics of who to target, their affinities, and one key message that might resonate. They're useful when buying an email list or building a large, targeted campaign. But you don't connect with demographics, you connect with people — individual human beings.

Marketing Persona

✓ Women ✓ Ages 35 - 50 ✓ Married With Kids ✓ Income Over $60K

UX personas expose your audience as complex and emotional human beings who don't always follow a logical path in making their healthcare decisions. They indicate not just one overarching message, but the finer points of what motivates them, what stops them, what expectations they have for your brand, and more. UX personas have a real name – John, Simone, Anita – so that you build a relationship with them.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Sure, Anita is fictitious, and she's based on demographic data, but she feels real now. You understand her concerns and want to build structures, designs, and content that truly meet her needs.

How Do I Choose My Healthcare Personas?

Start with data. Who are your top audiences? Where are your key opportunities for growth? It may be tempting to jump to service lines like primary care, ortho, heart, or cancer, but it's often better to consider the human first. For example:

- Unengaged young millennial

- Starting a family

- Commander in care (cares for herself, her kids, her spouse, her parents)

- Entering retirement

- Chronic condition (perhaps managing diabetes)

- Sudden acute care (perhaps cancer)

Each of these personas is approaching healthcare decisions in very different ways. When they come to your website, app, or campaign, they have specific needs for information, the tone in which it's provided, and how steps in their journey are connected.

How Many Healthcare Personas Should I Create?

Generally, three to six healthcare personas work best. Never create more than eight. If you build fewer than three, you're probably missing key audiences; more than eight is too many to handle and you'll stop bonding with each as an individual and start trying to meet too many needs at once.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

How Do I Build a Healthcare Persona?

Personas require both quantitative and qualitative data.
Quantitative data is market research, buyer and usage trends, and web or campaign analytics. This data verifies the types of actions your personas take. But it's the **qualitative data** – such as stakeholder interviews with people who represent the persona or staff who regularly interact with patients across their journey – that helps you paint the human side of the persona. Discover and describe your persona's motivators, healthcare goals, pain points, communication needs, and journey to uncover the healthcare experience from the point of view of your persona.

Who Should Use a Healthcare Persona?

Personas generally originate with marketing because that group owns the "voice of the consumer." But ideally, every person in your organization will champion your healthcare personas.

At its core, a persona should inform branding, design, content, and business requirements for any new digital application. But healthcare personas also can impact clinical operations (e.g., how different clinical steps are connected), clinical tools (e.g., virtual care interfaces) and clinical communications (e.g., discharge instructions). When different groups are at odds about next steps, all involved should take a step back and ask, "What does [persona name] need?" and let the answer guide the conversation.

What's the Value of Building Personas?

Personas often get skipped because it takes time and money to do them well. But whether you measure ROI financially (increased patient volume and retention) or by quality (better health outcomes), consider this: if you build products or generate content that doesn't resonate, your healthcare consumers won't respond.

Personas drive consumer experience and inform projects to make them more successful. How much will you lose if you don't build personas for your true audience?

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

SUCCESS STORY

Heightened Understanding of the Patient Experience Boosts Volume

Seeking to grow its primary care practice across a bi-state area, a nationally recognized health system needed to locate and eliminate points of friction across the consumer digital experience.

Journey maps identified patient interactions, emotions, and experiences across four personas, highlighting opportunities to influence behaviors and generate opportunities.

We pinpointed existing negative drag on conversion rates and projected hard ROI for identified improvements, with $4 million projected in downstream revenue.

$4M
Projected
downstream revenue

1.8M
New impressions
for PCP doctors

300%+
Increase in monthly
physician searches

Intro

**Your Healthcare Audience:
Patient, Consumer, or Human?**

**Your Guide to
Healthcare Personas**

**Understanding Healthcare
Journey Maps**

**Get Started Building
Healthcare Journey Maps**

How Perficient and
Acquia Can Help

How Often Should We Rebuild
Our Healthcare Personas?

Once your personas come alive as real people and you build around them and test according to their needs, you'll begin to notice if they no longer match the people they're meant to represent. Young unengaged millennials will grow up and start to raise families, and subsequently may behave differently. As people with chronic conditions gain tools that better meet their needs, their concerns may change. You may even notice new key audiences that aren't being adequately represented.

How will you know? Because you get feedback regularly from clinical partners, "contact us" forms, patient-family advisories, user testing with patients, and more. And you will use that feedback to continually evaluate your audience and their needs.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Lift Your Consumer Experiences by Building Personas

It's possible for internal teams to build their own personas, but partnering with an expert helps ensure your personas aren't conceived through an internal lens or colored with internal biases. Our healthcare strategists have years of experience building surveys and interviewing stakeholders in ways that bring to light key nuances without leading stakeholders in any specific direction.

Are you ready to create a truly consumer-focused experience that delights your audience and encourages them to take next steps to improve their health? Then it's time to build your healthcare UX personas to understand your audience's concerns and expectations, and get the foundation you need to build websites, apps, campaigns, and journeys that inspire your audience to finally pay more attention. We can help you jump start your progress.

Explore Our Healthcare Journey Jump Starts

Intro

**Your Healthcare Audience:
Patient, Consumer, or Human?**

**Your Guide to
Healthcare Personas**

**Understanding Healthcare
Journey Maps**

**Get Started Building
Healthcare Journey Maps**

How Perficient and
Acquia Can Help

Understanding Healthcare Journey Maps

Healthcare journey maps are usually drawn as a linear progression with a clear beginning and end. But look closely at the healthcare journey and you'll see it's circular. The end of treatment doesn't mark the journey's end; instead, it's a period of maintenance before the next symptoms or life events trigger the journey to resume. This isn't pessimism or an assertion that people keep getting sick. Rather, it's an acknowledgment that each healthcare encounter – how we find care, receive care, and engage aftercare – dramatically impacts how we make healthcare decisions when the next health issue arises.

By focusing on the circular nature of the journey and fine-tuning each of its touchpoints, you can increase patient satisfaction, loyalty, and retention.

What Is a Healthcare Journey Map?

A healthcare journey map is a visual or text-based depiction of each touchpoint in a patient journey. The key is to describe each phase, touchpoint, and related issues – motivations, pain points, emotions, messaging opportunities, or other details.

What's the Difference Between a Healthcare Journey Map and a Healthcare Customer Experience Map?

Healthcare journey maps and experience maps are different names for the same thing. The primary purpose of crafting the journey map is to better understand and ultimately improve the customer journey, and so it is often called a customer experience map.

What Are the Phases of a Healthcare Journey Map?

No matter the symptoms or diagnosis – nor whether in-person or virtual, primary or specialty care – in non-emergency situations, the journey typically goes something like this:

Before Treatment

- **Deciding to Act**
  New symptoms or a life event prompts action

- **Researching Care Options**
  Doctors, locations, specialties

- **Making Contact**
  Reaching out to learn more or to schedule by phone, online, web chat or other means

During Treatment

- **Pre-Service**
  Addressing insurance issues, completing intake forms, getting medical records, and related issues

- **Arrival**
  Getting to and waiting at the physical location or virtual waiting room

- **Appointment**
  Time spent with clinicians

- **Diagnostics**
  Additional labs, imaging, or other diagnostic tests

- **Treatment Plan**
  Providing a program or advice to treat or manage a health issue

- **Discharge**
  Patient departs, follow-up instructions provided

After Treatment

- **Follow-Up**
  Receiving prescriptions, booking follow-up appointments, and related issues

- **Maintenance**
  Managing health and maintaining wellness

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

What Are Journey Map Touchpoints?

During each of the phases on the previous page, a patient will likely experience multiple touchpoints. For example, in researching care options, a person may search the internet, talk to friends, approach patient advocacy groups, contact their insurance company, and much more.

Each of those actions is a touchpoint, and in an ideal journey, the touchpoints are seamless, each leading to a clear next step. In a convoluted journey, touchpoints may be circuitous or completely disjointed, leading to uncertainty or dissatisfaction.

What Does a Typical Journey Map Template Include?

There is no single ideal journey map template or model. The ideal journey map design may vary depending on the specific journey being outlined and how the journey map will be used. More detail isn't necessarily better. Too much detail may clutter the story if the goal is to provide a big-picture view.

On the other hand, if the journey map is being used as an internal map to fine-tune improvements, insufficient detail will mean key opportunities are missed. Ultimately, the journey map should tell a meaningful story about the healthcare consumer experience and clarify opportunities for improvement.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Are Journey Maps Based on Personas?

All journey maps are based on a persona. In some cases, the persona will be drawn out in detail with a persona card and journey map working in tandem. Journey maps may even combine the persona and journey map into one consolidated view. However, it's also possible the persona might not be fully built out, but only conceptually considered.

How Do I Use Journeys in Healthcare?

Marketing, clinical, and patient experience teams can all leverage healthcare journey maps. Marketing tends to own the "before" phases, when people are healthcare consumers searching for the

best care option. Clinical and patient experience teams tend to focus on the "during treatment" phases. The "after" phase is too often ignored. This is a huge loss for both the patient and the health system, and shouldn't be overlooked.

Again, the journey is circular. Focus on creating a seamless connection across all touchpoints, again and again, to build a better healthcare consumer and patient experience and ultimately build loyalty.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Are Healthcare Journey Maps Like Retail Journey Maps?

Healthcare journey maps follow the same concept of retail journey maps because, like retail consumers, healthcare consumers go "shopping." They follow a series of steps and a whirl of emotions as they make their healthcare decisions.

Both retail and healthcare journey maps address pain points and are focused on building a more seamless journey. But healthcare is much more complicated, intersects with many more systems, has less-transparent pricing, and tends to be much more emotional – particularly for journeys where life or quality of life is at stake.

All of this means that the process of building a healthcare journey map looks very different than the process for retail journey maps.

SUCCESS STORY

Deeper Understanding of the Patient Journey Enriches Connections

In a service line like oncology, patients and their loved ones experience a variety of emotions.

Henry Ford Health System's breast cancer service line sought to more meaningfully connect with, acquire, and retain oncology patients. Personas and journey mapping identified the varied emotional states and needs the health system could address, from initial diagnosis through second opinion and survivorship.

An updated site architecture and content strategy, structured to address the needs in a patient's journey, supports individuals and their support network each step of the way.

Journey-based content architecture

Needs-centered content

Explore Our Healthcare
Journey Jump Starts

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Get Started Building Healthcare Journey Maps

You've learned about healthcare personas and journey maps. Now you're ready to create a journey map for your healthcare organization. What's the process?

In our experience of building healthcare journey maps, the most important factor is to have a solid foundation in healthcare. The person who builds the journey map should:

✓ Have a strong knowledge of typical healthcare processes

✓ Know what types of technology might be involved

✓ Demonstrate patient empathy

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

With that framework in mind, here's the five-step process to build a healthcare journey map:

1. Understand your healthcare persona

2. Research the healthcare journey

3. Map the healthcare journey

4. Share the story and strategic recommendations

5. Assemble a team to improve the journey

Let's explore each step!

Step 1: Understand Your Healthcare Persona

A healthcare journey map should be based on a particular healthcare persona. While you may not build out a persona card for the journey map persona, you still must have a solid understanding of who it is.

You can build this understanding through interviews with patients or staff members, such as clinic coordinators, who work closely with and engage in non-clinical conversations with patients. But remember, the journey map should look outside the clinical lens and through the eyes of the patient.

You might also use site surveys or other market research to learn more about your persona(s).

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Step 2: Research the Healthcare Journey

You'll want to do some "mystery shopping." Test out the process and conduct the type of online research your targeted persona will perform. For example, try to schedule an appointment online, and make an appointment over the phone. As you go through the journey yourself, you'll learn a lot.

For steps on the journey that you're not able to test yourself – the actual appointment, the discharge instructions, etc. – really probe to uncover specific details. If relevant and appropriate, ask for copies of documentation. When you're told, for instance, "Patients receive a notification that they're due for an appointment," ask what the notification says, what call to action is in place, how users can respond, and so on.

This is where it's particularly helpful to have a strong healthcare foundation. You'll know what types of questions to ask and be able to probe appropriately without being intrusive or seemingly "out of touch."

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Step 3: Map the Healthcare Journey

Start with index cards or sticky notes. Write out each touchpoint and post them in order. Find where gaps remain and where the story isn't yet complete. See where some touchpoints overlap or repeat. Indicate the emotions associated with each stage in the process. The journey map should start to feel clear now.

Next, work with a designer to flesh out the best visualization for your journey.

Intro

Your Healthcare Audience: Patient, Consumer, or Human?

Your Guide to Healthcare Personas

Understanding Healthcare Journey Maps

Get Started Building Healthcare Journey Maps

How Perficient and Acquia Can Help

Step 4: Share the Story and Strategic Recommendations

The journey map visualization will provide an executive summary of the journey and how different touchpoints flow (or should flow) from one to the other.

But the journey map also should have a point. The next step is to share the "so what?" aspects of the journey. Identify the journey stages that are proving particularly problematic (or delightful!) and explain why. Build additional slides that tell the story behind the map. At the end, provide clear strategic recommendations – the next tactics or strategies needed to improve the journey.

If many tactics are needed, plot them on a quadrant with easy to difficult on one axis, and low to high value on the other. Based on the quadrant, determine which strategies to take on first, and develop a timeline for future updates.

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

Step 5: Assemble a Team to Improve the Journey

This step isn't really about building the journey map itself, but if your journey map is to have value, this step is essential. A journey map that sits in a drawer has no purpose, so don't let that happen! Make sure to keep the momentum.

Assemble a team and assign roles for each of the next strategic tactics identified in Step 4. Determine if those who've been assigned to undertake those roles and tasks truly have the bandwidth and the authority to make the change required. Keep it realistic so that your project will be completed.

Intro

**Your Healthcare Audience:
Patient, Consumer, or Human?**

**Your Guide to
Healthcare Personas**

**Understanding Healthcare
Journey Maps**

**Get Started Building
Healthcare Journey Maps**

How Perficient and
Acquia Can Help

Lift Your Consumer Experiences

Personas and journey maps build empathy, understanding, and direction to help your marketing, operations, and care teams deliver more meaningful and impactful experiences.

Perficient brings deep healthcare industry expertise to help you build an integrated strategy that starts with understanding your consumers' journeys and how they make their care decisions. Are you ready to attract and nurture consumers and position your organization as service line leaders?

**Explore Our Healthcare
Journey Jump Starts**

Intro

Your Healthcare Audience:
Patient, Consumer, or Human?

Your Guide to
Healthcare Personas

Understanding Healthcare
Journey Maps

Get Started Building
Healthcare Journey Maps

How Perficient and
Acquia Can Help

How Perficient and Acquia Can Help

With nearly every aspect of the industry changing, healthcare marketers know they need to transform their customer experiences. They're working to determine which digital marketing platforms, personalization tools, and methods of customer engagement will move them toward their goals.

Acquia is the pioneering solution to help deepen customer relationships through highly personalized digital interactions. Together, Acquia and Perficient have partnered to design, build, and launch modernized digital experiences for healthcare providers.

Now is a crucial time for the industry. The ability to effectively and respond to opportunities, and implement the right technology solutions, will be key to growing and thriving. And growing and thriving are what healthcare is really all about.

Learn how our work with Genesis Healthcare empowered marketers with complete authoring control to launch a new website in under six months.

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Perficient is the leading global digital consultancy helping transform the world's largest enterprises and biggest brands. As a trusted end-to-end digital provider, Perficient partners with its Global 2000 and other large enterprise customers across North America to design and deliver digital transformation solutions that exceed customers' expectations, outpace the competition and transform their business.

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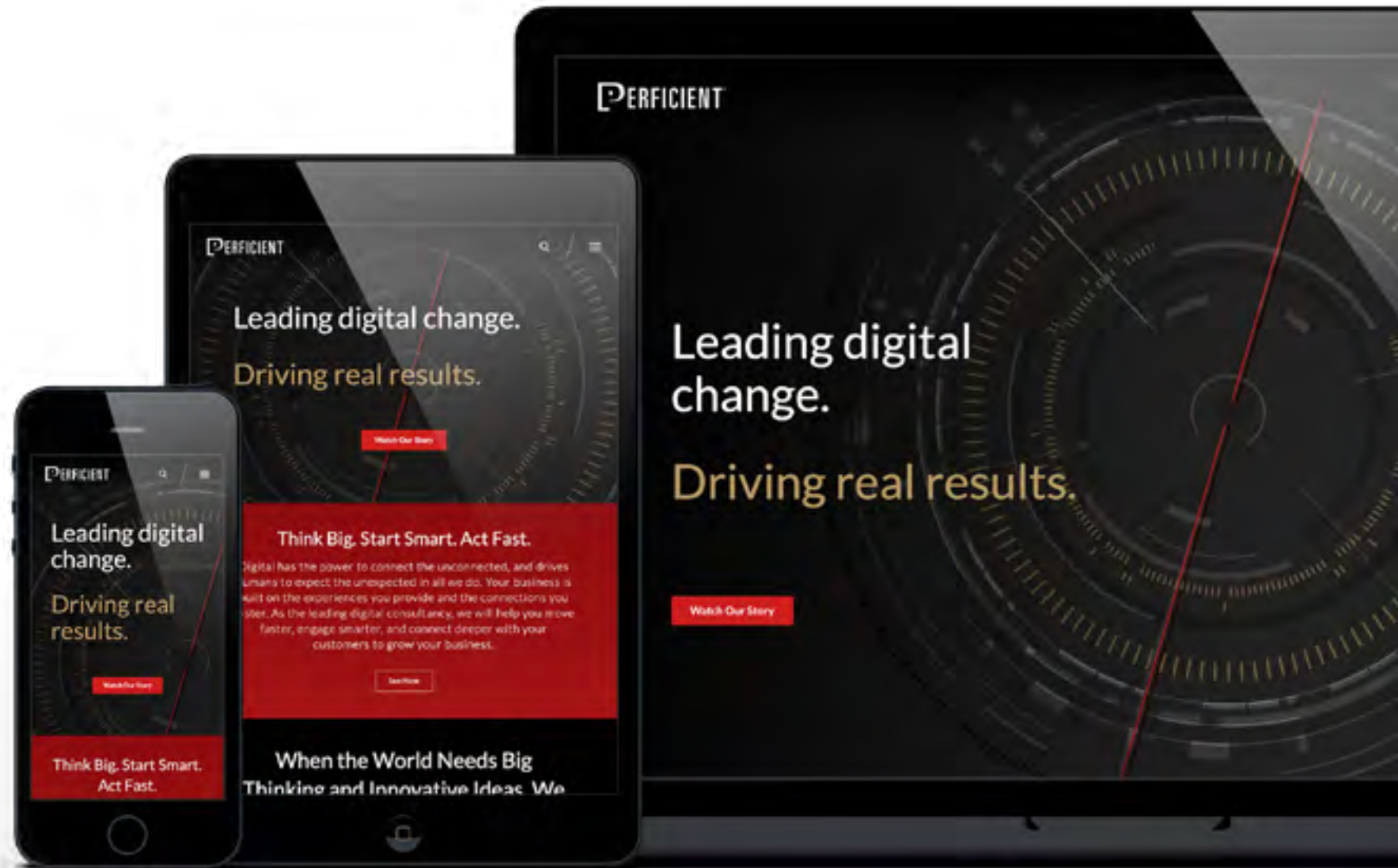
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