

Designing for Impact: How Service Design helped us better understand Macmillan's Coffee Morning and cut across organisational silos.

Who are we?



Steven Newstead

Head of Engineering, Macmillan Cancer Support



Amie Slade

Customer Journey Manager, Macmillan Cancer Support

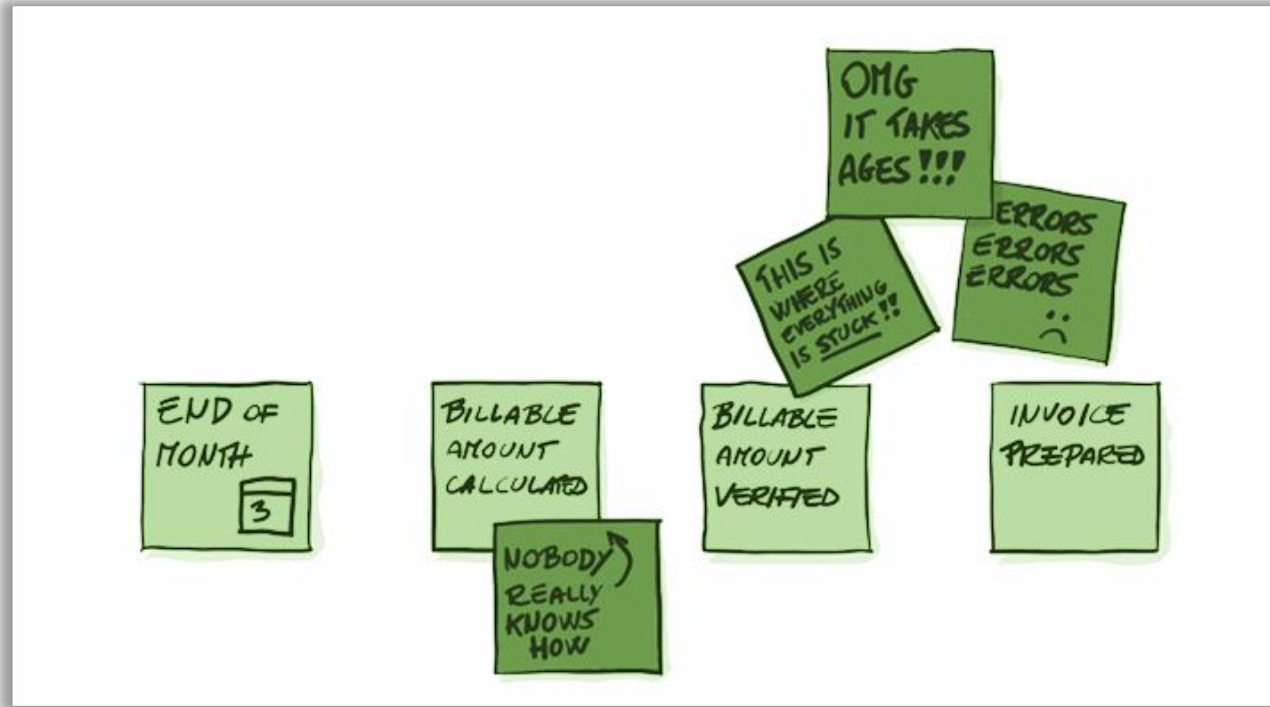


Claire Reynolds

Director of Third Sector, Healthia (formerly Mace & Menter)

The problem with building products and services at Macmillan

Silos & handoffs



Some aging technology





**"We stand
for betterness."**

Douglas Macmillan, 1913

MACMILLAN
CANCER SUPPORT

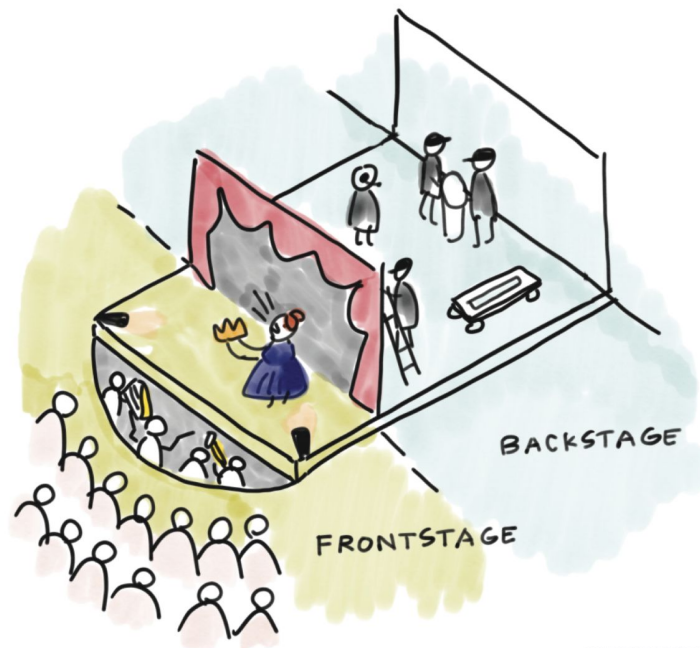
 **Healthia®**

Everything in your organisation affects your service

Lou Downe

Build good services - the aim

- To better **understand the “as-is” Coffee Morning service**, mapping the front & backstage experiences.
- To identify the **gaps, opportunities & pain points** within the service.
- Conduct further research to **unpick those pain points & start exploring solutions**.
- Provide **an exemplar of what “good” looks** like for mapping & understanding Macmillan’s services.



NNGROUP.COM NN/g

The use case: Coffee Morning

Coffee Morning in numbers

Macmillan's flagship fundraiser

In 2023:

- **£18+ million** raised - enough to fund **288 Macmillan nurses for a year**
- Almost **90k registrations**
- Approx. **56k people** took part

www.macmillan.org.uk/coffee-morning

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Coffee Morning journey mapping

Customer journey mapped through
lens of 2 customer personas

Lots of data but still some gaps

Key customer pain-points
identified and work in progress to
resolve

*I find it hard to physically
pay in the cash donations
as most of the NatWest
branches around me have
either closed or don't
open on Saturdays.*

*I don't really use QR
codes and I don't know
many people who do.*

*Had to contact Macmillan
to verify that my cheque
had arrived.*

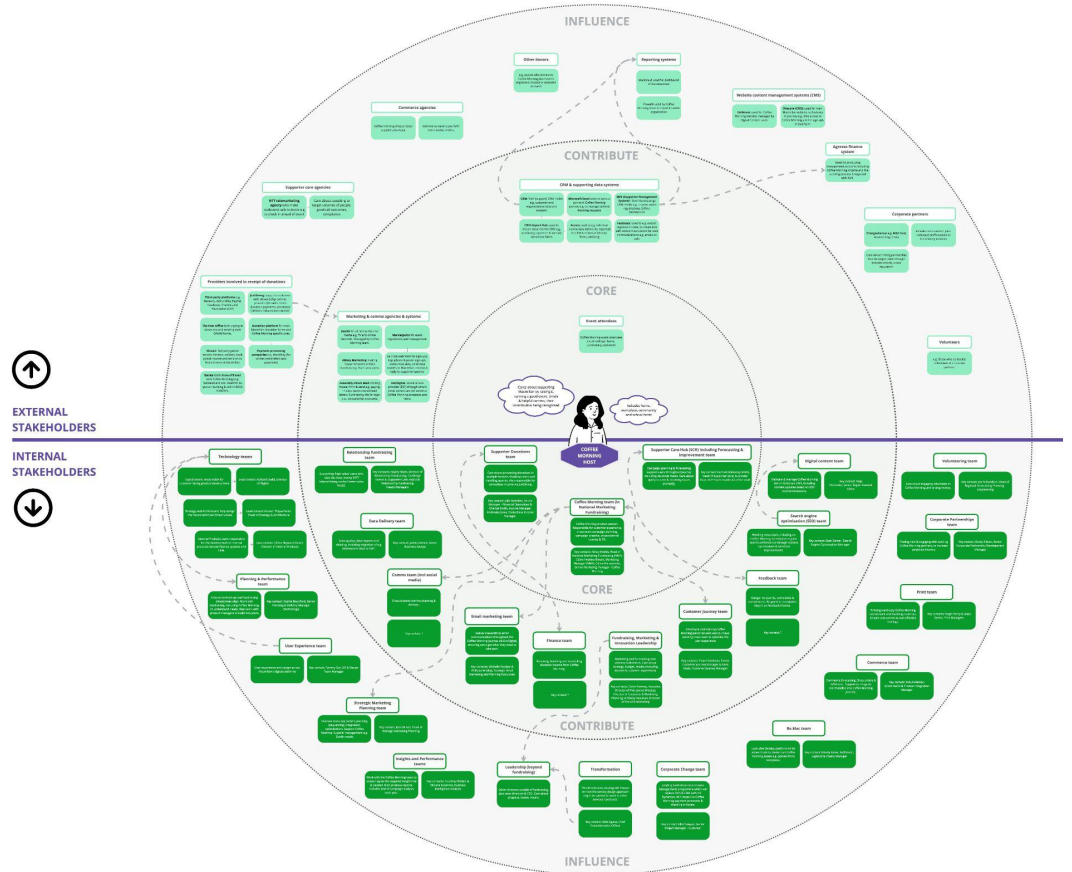
*A thank you letter that
comes quicker so you can
prove you've paid money
in. Also so you can show
someone who has done
baking for event.*

The need for a service blueprint

Incomplete picture of 'backstage' challenges which were causing customer problems

Huge volume of stakeholders involved in delivery

Missing a holistic view of journey



A service design approach

“Service design improves the experiences of both the user and employee by designing, aligning, and optimizing an organization’s operations to better support customer journeys.”

Nielsen Norman Group

1. Creating a service blueprint

Service name

HOST A COFFEE MORNING FUND RAISING EVENT

Time

< AVG. DURATION >

< AVG. DURATION >

Customer lifecycle stages

UNDERSTAND

SIGN-UP

Customer Actions

The experience of the customer - their steps, choices, activities, and interactions.

New host

- See TV ad for Coffee Morning
- Google 'MacMillan Coffee Morning' at work as they were already planning to organise a staff engagement activity

Existing host receives one or more of:

- Direct mail through the post
- Email
- Telemarketing call

Frontstage actions & touchpoints

Human, technology & physical touch points

- Who does the customer see or speak to?
- Where would they be?
- What physical or digital objects would they use?



LINE OF VISIBILITY

Backstage actions that are not visible to the customer

- Who plays a key role in creating or maintaining the service?
- What are they doing and why?
- How long does it take?
- What do they need to fulfil their tasks?
- What do they need to provide to the next people involved in service delivery?



Systems & processes that need to be in place for staff & customers to complete the above actions.

- What physical or digital infrastructure is used?
- What rules, laws or formal processes influence how the service is delivered?

e.g. registration system, payment processes, third party delivery services, integrations between systems.



Pain points & opportunities

Is there any evidence?

E.g. metrics report



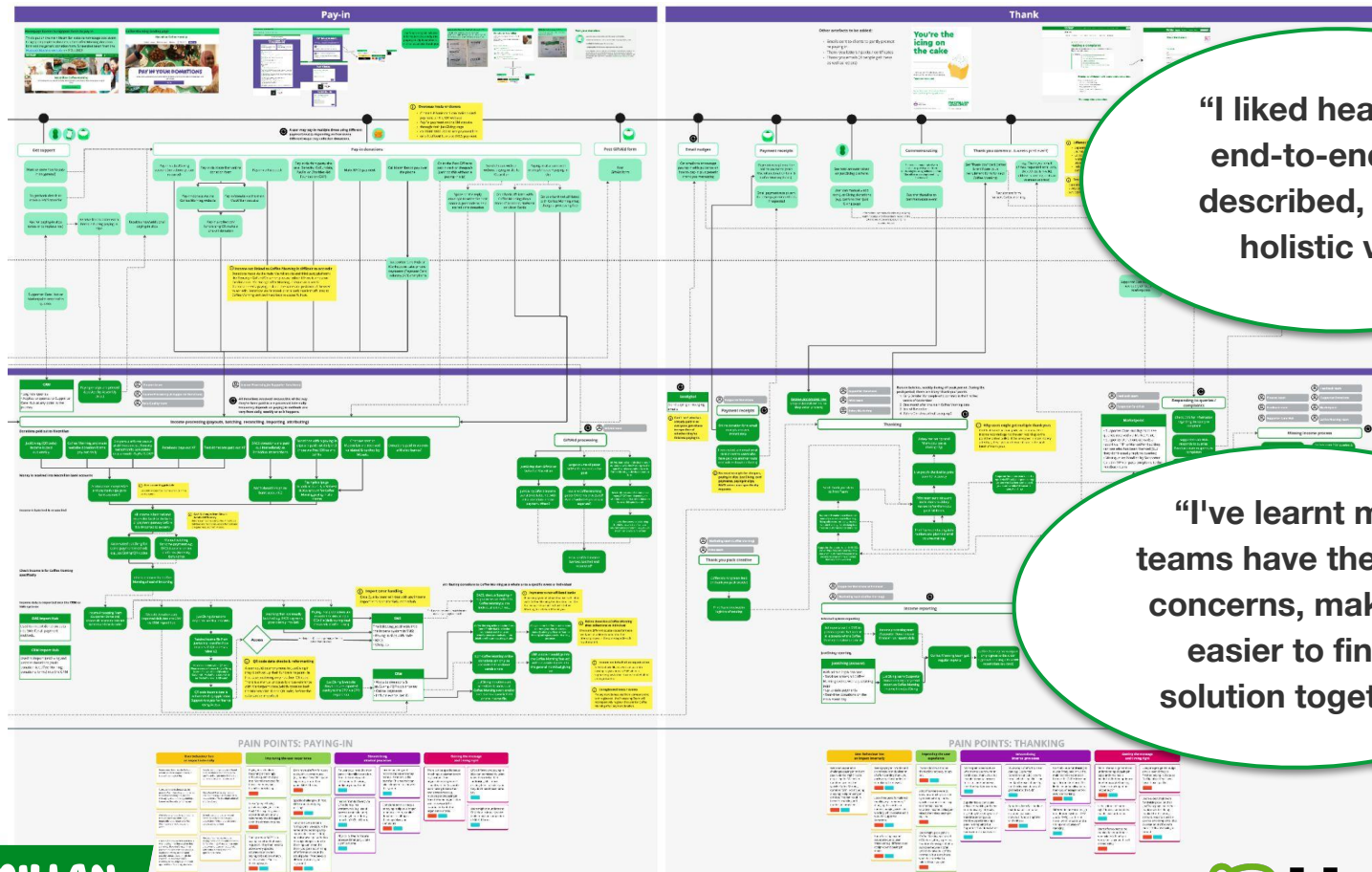
Why?

- Provide visibility of the whole service
- Simplify & clarify complex data
- Identify opportunities for optimisation & innovation
- Enhance team alignment & collaboration
- Support user-centred decision making

How?

- Created the canvas & populated the customer journey
- x2 remote workshops with 30+ stakeholders
- First full draft
- Feedback
- “Final” blueprint creation *

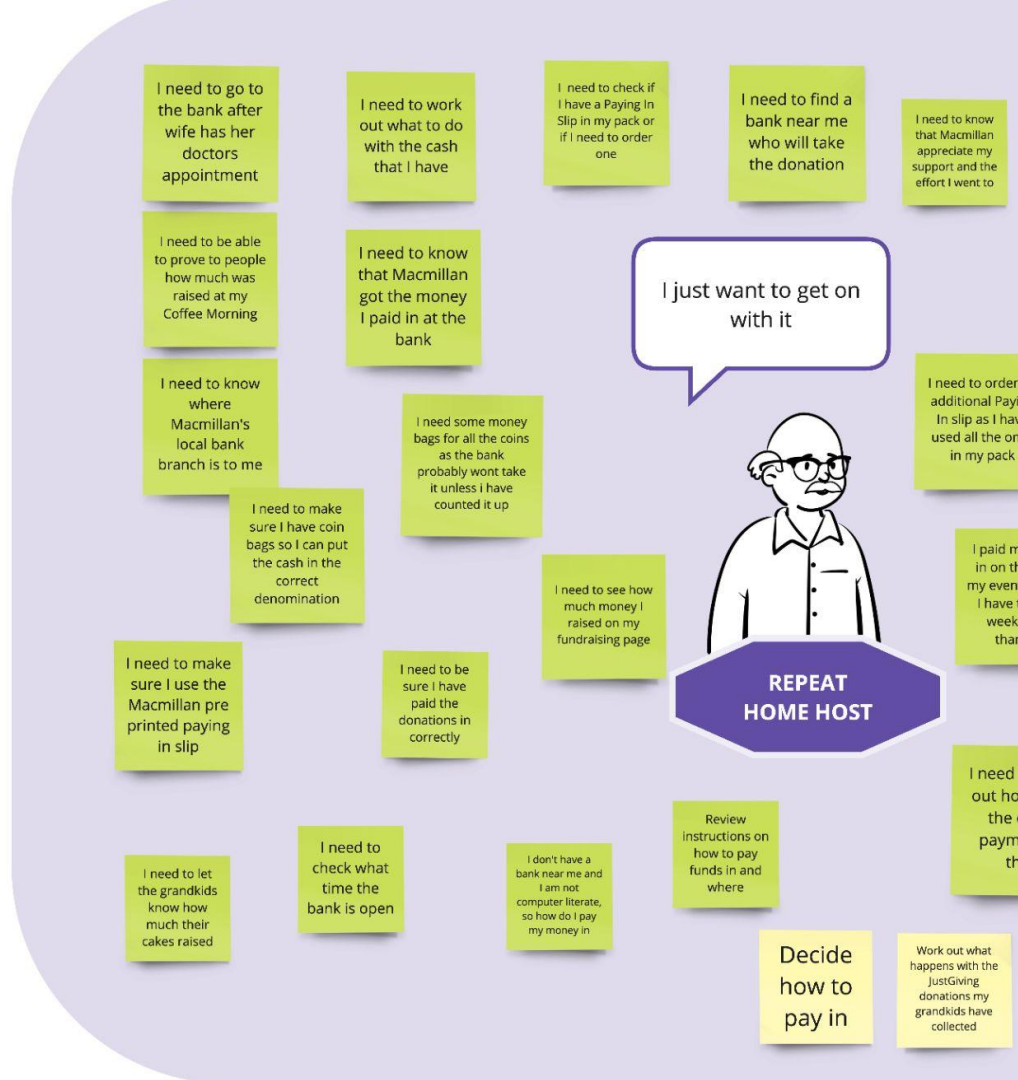
** it's never actually finished*



“I liked hearing the end-to-end being described, giving a holistic view.”

“I've learnt most teams have the same concerns, making it easier to find a solution together.”

2. Defining the 'jobs to be done' (JTBD)



a) The 'jobs to be done' statement

JTBD template

When...*(situation)*

I want to...*(motivation)*

so that...*(expected outcome)*

Internal Coffee Morning JTBD

When...people pay in Coffee donations via any method

we want to...know whose money it is as quickly as possible

so that...we can thank people swiftly and accurately

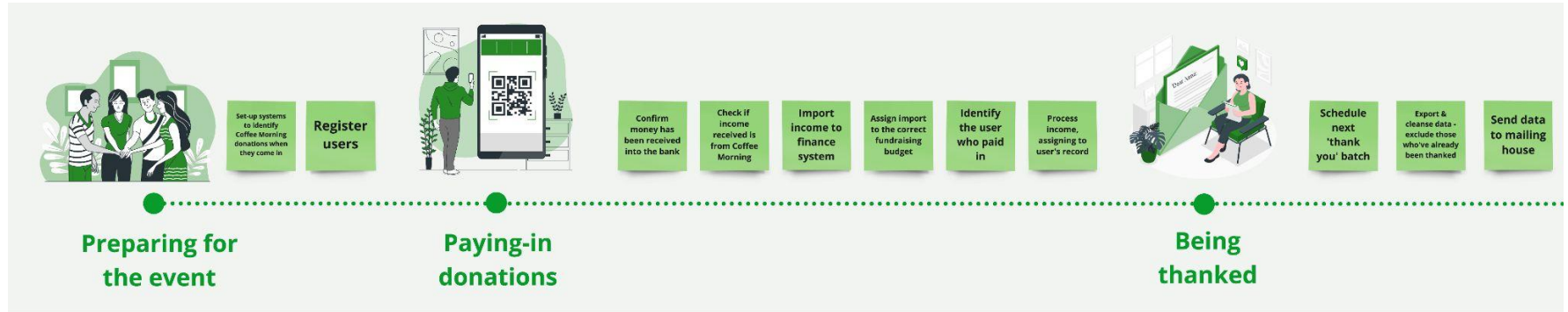
Coffee Morning host JTBD

When...I finish my Coffee Morning event

I want to...pay in the donations I've collected as easily as possible

so that...Macmillan can use it to support people affected by cancer.

b) The job steps



Why?

- Simplify and summarise the big picture.
- Move away from **how** something is done (the solution) and focus on the **what** and **why**.
- Ensure you solve the right problem & don't just add unnecessary features.

How?

- A remote workshop with key internal stakeholders.
- Co-developed JTBD for internal users & Coffee Morning hosts.
- Defined the core steps required to complete that job.
- Identified how those steps might vary for different payment methods.

3. Ideating to improve the experience

In 5 mins, come up with as many ideas as possible!

(collecting donations)

How might we know the ways people have engaged with Coffee Morning (e.g. JG page + something else) before they pay-in?

- Encourage people to add their coffee donations to their JG page so we can see who has paid in another way too

How might we make it easier to collect 'after event' donations?

- Give a deadline for paying in - count down for people, 1 week until the grand totaliser - get your donations in now
- Communicate to hosts post coffee morning ways to pay in.
- Generate them at registration rather than batches
- Use the upload we do for JG New Page Reports to record who owns the JG QR Code
- Provide unique reference at point of sign up that they can put on any paying in methods/where with co-hosts to use?

How might we streamline the QR code process and reduce effort?

- Have the same QR code per year
- Update the PISN area to record QR Code and so can use for income import
- Record the supporters MP ID on justgiving (maybe reusing Finance Code field?)
- Monzo / Starling banking - phone banking transfers
- Are we allowed to do that? Register a card and people can add their card! We don't have direct bank online

Something else!

- Ask them straight after the event
- Connect up all data sources to CRM
- Send link in email to their record
- Communicate in milestones?
- Get our income import to reference QRcode in external reference or process the JG QR Income
- QR code only given on request and process automated
- Record the supporters MP ID on justgiving (maybe reusing Finance Code field?)
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Lifetime QR Code

- Give our income import to reference QRcode in external reference or process the JG QR Income
- QR code only given on request and process automated
- Record the supporters MP ID on justgiving (maybe reusing Finance Code field?)
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Other ideas:

- Ask people how they want to donate "by the way if you do it this way it'll save us money" "gentle nudging"
- Ask people on sign-up their payment preferences - could we save on PIS if people don't want them?
- Lifetime QR, discussed it before, only generate new ones to accommodate manual process, could be different
- We're asking people to do something. HUGE - loads of people are spending a lot of their own money to put the event together
- Half of all money coming in is coming by card - average is £320, so although digital would be great, need to be mindful of that
- It's not how much we save but how much of your donation actually gets to Mac? Get the most out of donations
- Could there be an admin fee to process payments? Like JG does?
- Have the same QR code per year
- Update the PISN area to record QR Code and so can use for income import
- Record the supporters MP ID on justgiving (maybe reusing Finance Code field?)
- Monzo / Starling banking - phone banking transfers
- Are we allowed to do that? Register a card and people can add their card! We don't have direct bank online
- We need to make cash payments easier
- Have the same QR code per year
- Update the PISN area to record QR Code and so can use for income import
- Record the supporters MP ID on justgiving (maybe reusing Finance Code field?)
- Monzo / Starling banking - phone banking transfers
- Are we allowed to do that? Register a card and people can add their card! We don't have direct bank online

Why?

- Encourage creativity and drive innovation.
- Enhance user-centricity by focussing on user needs and pain points.
- Encourage cross-team collaboration and engagement.
- Reduce risk by enabling early exploration of multiple ideas.

How?

- Developed 'How might we' statements.
- Ran an ideation workshop.
- Generated as many ideas as possible.
- Clustered and voted on ideas.
- Developed the top ideas & pitched them.

To make it easier for people to pay-in donations (e.g. how to use a PIS, how to pay-in cash) create and link to YouTube 'training' videos

tailor communications to specific regions. E.g. in Yorkshire most people do the or direct

send hosts a sms or whatsapp nearer the time to explain easy steps of what to do.

link to a branch locator

Mostly around promotion

utilise facebook group to talk about how to take donors to the bank and what you need to do with cash

yes and other social channels

Get a text link to the video

and via email

make it accessible for non-tech users - is there an offline version?

Make videos accessible to limit barriers

"I liked how we were told to suspend the butts and if it had been tried or failed before."

share letters all in for via text or email

Get a text after their good luck TM call or on the day of their event with a link to the paying instructions

Create YouTube videos for each area with a susupported in the pack

Add the video to the paying in section of the website

embed on website too

People more likely to follow link from text or email?

More legit through text?

language maximilian language e.g dont say PIS

SMS or WhatsApp (or just digital) thanking

Sharability

If we provide a digital thank you card it would be easier than the current postal thank you for people to share with their families. WhatsApp email etc.

Easier to share a digital TY with others

use of GIF images if using whatsapp

knowing it is important that digital thanking is not being given as a reward more income to go directly to helping people living with cancer.

Bring it to life

ask if they want to do something else and offer a link to signing up

Extra content

add a thank you video that messages the donor about why they are so important and how their money is used to help people living with cancer.

link to a bespoke thanking page with 'thanker', donor's name, certificate, specific impact you've made etc.

give the option to take their photos to add to their 'thanker' so they can share it with family.

if it is a donation to help our website that they can use normally.

Personalisation

for making might be better to pull data through to thank for in memory donations, further personalisation

Send a personal message if we can identify return supporters - 'welcome back!'

Timing

give option to get a postal thank you/certificate if they want one from that digital thank you

weekly cumulative thanking

it's instant, so really helps timelines

How

allow them to sign up for next

ask if they want to convert to regular giving through SMS (text to donate)

"I liked the opportunity to build on ideas."

allow them to provide feedback / survey

Some takeaways

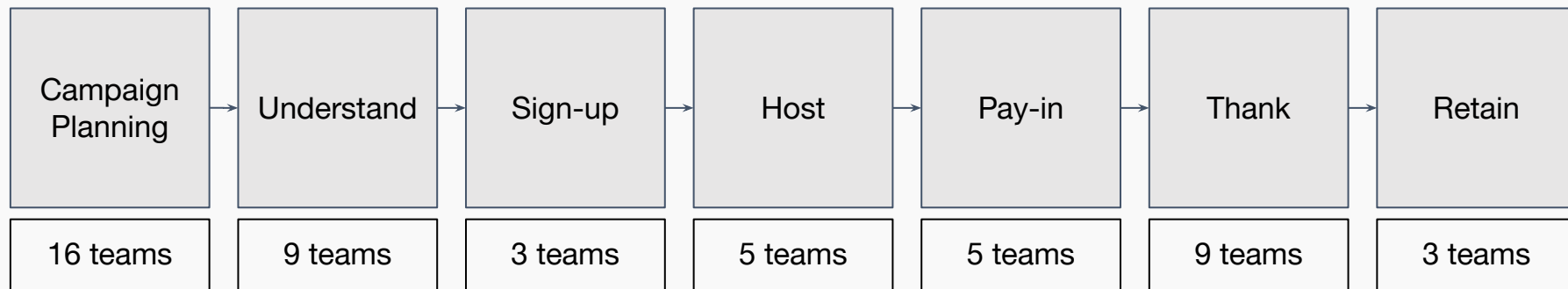
You have more
insight than you
realise

MACMILLAN
CANCER SUPPORT

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Be curious



Who owns the whole service ?

Be focused

Information & support

- Website
- Online Community
- Support from Cancer Information Nurses Specialists plus Cancer Information Advisers
- Email campaigns
- Volunteer services
- Well-being coaches
- Macmillan professionals
- Information Centres

Money & work

- Macmillan Grants
- Support on Financial Guides, Work Support, Energy Advice, & Welfare Benefits Advice

Care planning & navigation

- Clinical Nurse Specialists and support workers at the hospital
- Practice nurses and advisers in the community
- Professional learning and development

End of life care

- Palliative care roles
- Social finance funding model
- Professional learning and development

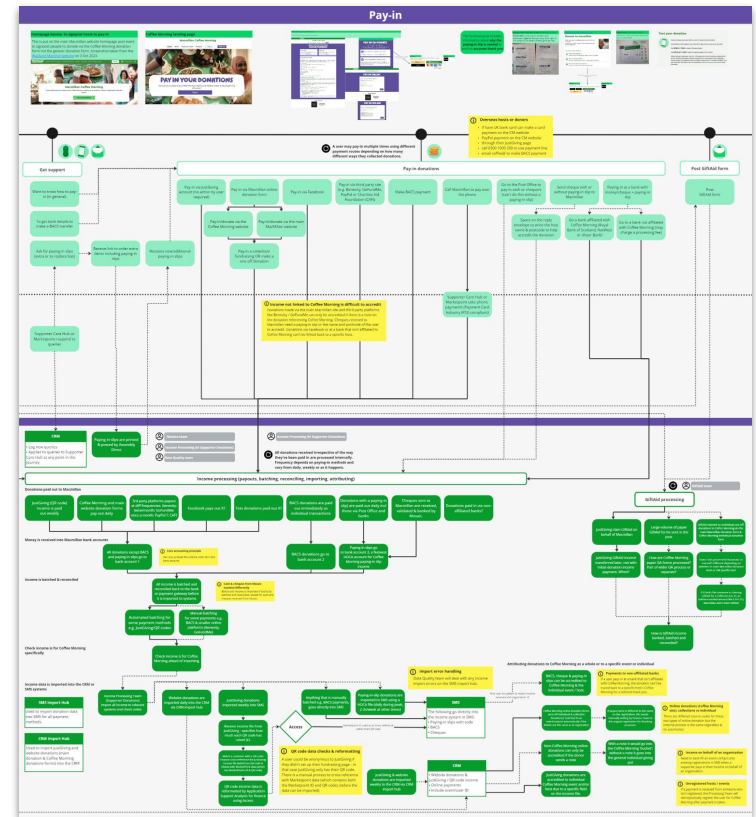
Emotional & practical

- Cancer Information Support Advisers – Macmillan Support Line
- Volunteer schemes
- BUPA counselling

And flexible...

We wanted to do more user research.

But our biggest knowledge gap was the back-office.



Seek consensus

(but know when to stop)

Lion and tiger time

Got a question?

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