

A smiling woman with dark curly hair, wearing a black blazer over a white t-shirt and a headset with a microphone, is seated at a desk in a call center. Another person is visible in the background, also wearing a headset. The scene is brightly lit with large windows in the background.

INFORMATION JOURNEY MANUAL

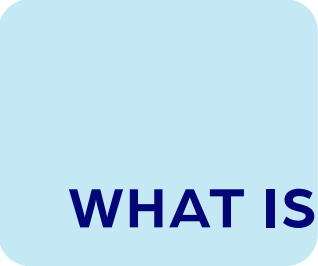
Version April 2023

Three overlapping squares in shades of orange and peach are positioned in the top right corner of the page.

HELLO, WELCOME TO THE INFORMATION JOURNEY MANUAL!

The Information Journey is an approach designed to facilitate a smooth information flow from the Ancillary Team towards the front-line staff in the contact centres. The Information Journey consists of a process proposal and a corresponding template to use during this process. This approach is specially designed for new ancillary go-lives. In this manual, you can find an elaboration of the approach and guidelines to help you and your team thrive during the journey.

Let's embark!



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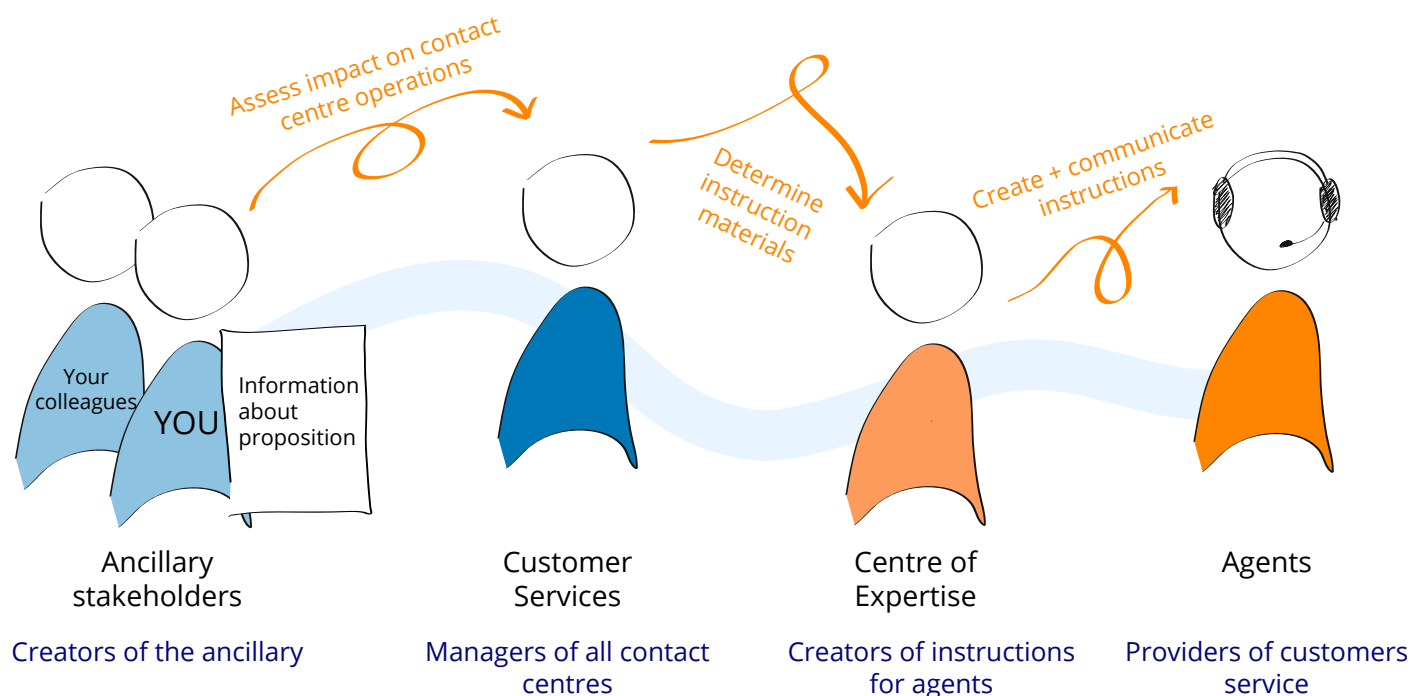
1. WHY HAS THE INFORMATION JOURNEY BEEN DESIGNED?

How did the Information Journey come about?

The Information Journey is the result of a graduation project that investigated how the information flow – concerning new ancillary go-lives – from the Ancillary Team towards the agents in the contact centres could be improved. This research showed that there was a need for a structured approach that defines responsibilities and facilitates early involvement of the contact centres, as well as an opportunity to exchange feedback between those who are involved. Furthermore, the research showed a need for a more engaging approach that facilitates a consistent supply of the required information. To ensure that the new approach met the needs of those that are involved in the information flow, the Information Journey was based on a series of co-creative sessions with relevant stakeholders.

Why is informing the contact centre important?

The contact centre agents need to help our customers with all sorts of questions. To answer questions about our ancillaries, they need to have access to correct information. If this information is missing, incomplete, or outdated, the agents are not well-equipped to help our customers. This may impact the customer service we deliver, and therefore can be harmful to our company.



2. WHO IS INVOLVED IN THE INFORMATION JOURNEY?

The transmission of information from the Ancillary Team to the contact centres resembles a chain with various links (see the visualisation on the left). The four main players are described below.

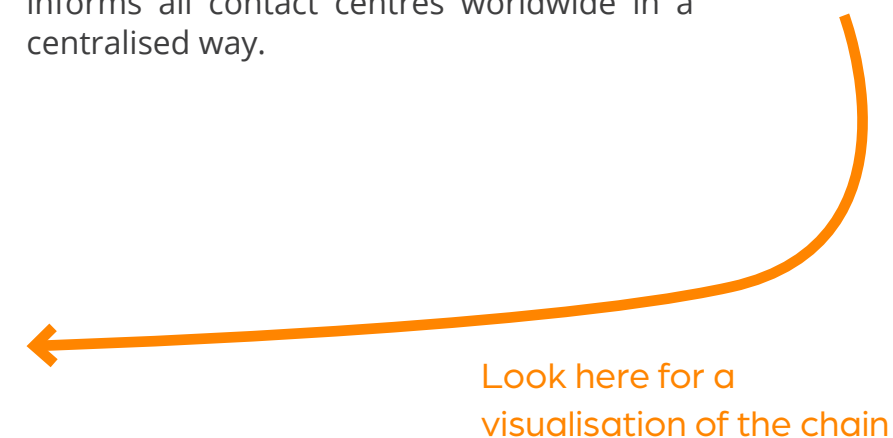
At the start of the chain are the ancillary stakeholders, who possess the ancillary information. This includes everyone that is involved in the development and management of the ancillary, e.g. the ancillary Business Owner and the Distribution Business Analyst. The latter two take up responsibility for the meeting and communication tasks with the next stakeholders in the chain. However, they may need to discuss topics with other ancillary stakeholders to gather all required information.

Next in the chain is the Customer Services team. They manage all of the company's contact centres worldwide. They are in between our business and the contact centre companies. Based on the information they receive from the ancillary stakeholders, they (together with the contact centres) can determine how the ancillary proposition impacts the customer service operations and thus which developments are required on their side. The Customer Services team informs all contact centres worldwide in a centralised way.

Next up in the chain is the Centre of Expertise from the contact centre's Knowledge Management Team. This team is in contact with Customer Services. Once all information is clear and complete, they process the information into instructions for the contact centre agents. These instructions are published in the ASK database, which is the main source of information for the agents.

Last in the chain are the agents at the contact centres. They apply the information that they retrieve from the database in their daily job to serve our customers.

All of these players depend on the previous person on the list. Hence, to ensure that the information smoothly reaches the agent on time, every previous player in the chain should also act on time. This starts with the ancillary stakeholders, who possess the information that eventually needs to reach the agent. The Information Journey guides the stakeholders in transmitting the information to the agents in the contact centres.



3. THE PROCESS EXPLAINED

The Information Journey consists of a series of process steps and an accompanying template to use during these steps. The process is specially focused on new go-lives and uses the PI planning as starting point. **The process consists of a Preparation, a Take-off, Phase 1, Phase 2, and a Touchdown.**

The preparation of the PI planning moment also functions as preparation for the Information Journey. After the planning moment, the Take-off starts, and the list of planned topics is shared with Customer Services. They then determine what topics require more information and therefore require to embark on an Information Journey. Customer Services points this out to the responsible Business Owner and Business Analyst of the concerned topics. To officially start Phase 1, the Business Owner plans the Halfway Check – the first deadline moment – with the Business Analyst, the Customer Services contact, and the Centre of Expertise contact.

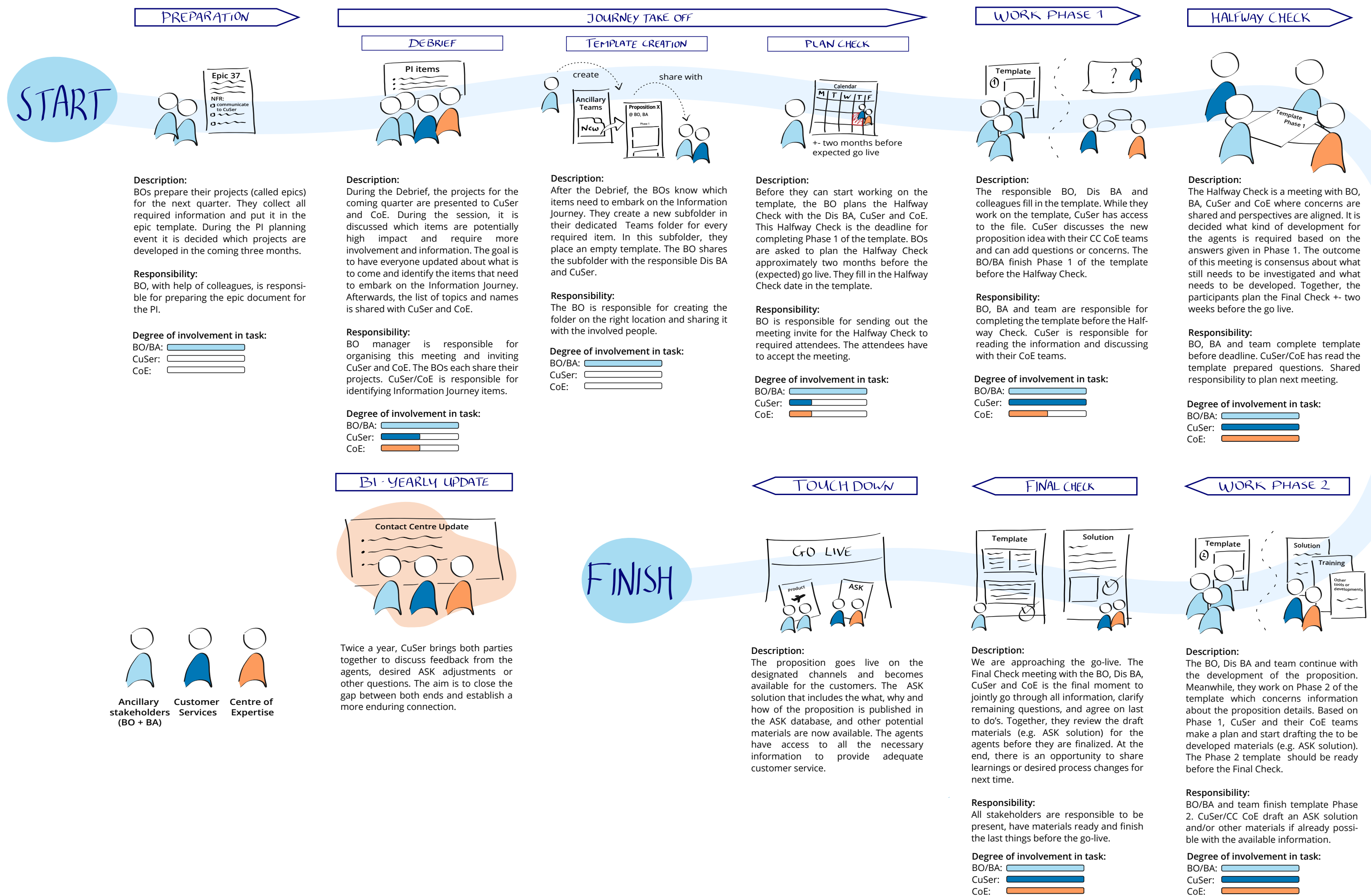
During Phase 1, the Business Owner and colleagues complete the template before the Halfway Check. The goal of this Phase is for Customer Services and the Centre of Expertise to understand the new proposition and determine the required developments on their side.

After the Halfway Check, Phase 2 starts. Phase 2 focuses on defining the technical how-to's and the proposition's roll out. **The Business Owners and colleagues complete the template before the Final Check.** During the Final Check, last details are discussed and draft instructions for the agents can be reviewed. After the Final Check, the contact centre is properly informed on time, which assures that the agents have timely access to the correct information. Hence, the Information Journey is complete.

See the visualisation of the Information Journey on the next pages for detailed descriptions and responsibilities at every process step. The template can be found on page 16.

PLEASE FIND THE VISUALISATION OF THE PROCESS ON THE NEXT PAGES.

Important note from the designer: the Information Journey is a "living concept", i.e. the concept is free to be adjusted to what the organisation needs. This version of the process and the templates were based on research done during a graduation project. Both elements of the Information Journey need to be put into practice and can be adjusted to what the organisation requires at a later moment in time.



4. THE MEETING GUIDELINES

The Information Journey contains two check meetings with the Business Owner, the Distribution Business Analyst, Customer Services and Centre of Expertise: the Halfway Check and the Final Check. These checks are used to clarify any remaining questions regarding the information in the templates, align all stakeholders, and define everyone's next steps. **The template contains a dedicated space for the meetings' main takeaways and learnings.** Once these have been filled in by the Business Owners, the Phase has been completed.

On the next pages, you can find suggested meeting agendas for the checks. However, feel free to deviate from these suggestions whenever you think the situation requires it.

Below are some general tips you can apply to make the check meetings more effective.

- **Goal & agenda:** Be sure to mention the goal of the meeting in the invite, as well as at the start of the meeting. Especially in case of new attendees. When participants understand what they are going to do and why they are doing it, it is easier to keep them engaged during the meeting. Furthermore, this helps to avoid side discussions.
- **Read the provided information in the template beforehand:** This meeting is meant to discuss uncertainties, assess impacts and define the next steps. Therefore, to make the most of the available time, be sure to prepare well and read the document in advance, so the meeting can be used for discussion.
- **Give everyone the opportunity to speak:** Be sure to create a safe environment that enables all participants to contribute something to the meeting if they want to.
- **Close the meeting with clear Actions, Owners, and Timelines:** If there are next actions to take, specify who is going to accomplish the action and when it is due. These can be written down in the dedicated meeting space in the template.

Tips based on:

Forbes. (2019). 6 Expert Tips To Make Meetings More Effective And Engaging. [Click for link to page.](#)

Forbes. (2020). Make Your Meetings More Efficient And Effective With These 13 Strategies. [Click for link to page.](#)

Science of People. (2023). 6 Tips to Run a Highly Effective Meeting, Backed by Science. [Click for link to page.](#)

AGENDA SUGGESTION FOR HALFWAY CHECK

HALFWAY CHECK DISCUSS MAIN CONCERNS, ALIGN STAKEHOLDERS, DEFINE RELEVANT NEXT STEPS +5 min

Attendees: Ancillary Business Owner, Distribution Business Analyst, Customer Services representative, Centre of Expertise representative.

Meeting leader and timekeeper: Business Owner

Please find a suggested meeting agenda below:

1 DISCUSS CONCERNS BASED ON PROVIDED INFORMATION

The Customer Service and Centre of Expertise representatives share their doubts and concerns. These serve as starting point for a group discussion to clarify unclear items and get all stakeholders on the same page.

Time: 20 min

2 DEFINE MAIN ACTION POINTS FOR NEXT PHASE

Based on the discussion, next actions may appear. The Phase 1 template offers a space to write down the Action, the Owner, and the Timeline. These actions are to be filled in by the Business Owner and afterwards shared with all participants.

Time: 10 min

3 PLAN THE FINAL CHECK

Plan the Final Check moment together with all participants. Also, agree on the agenda for the Final Check to ensure that all expectations are aligned and all participants are well prepared.

Time: 10 min

4 WRAP UP

Give room for all participants to share any other items that they consider relevant to mention. Close the meeting.

Time: 5 min

Thank you for participating. You have just completed Phase 1. Great job team!

You are on the right track. Keep it up and complete your next tasks before the Final Check.

AGENDA SUGGESTION FOR FINAL CHECK

FINAL CHECK

REVIEW MATERIALS, SHARE LEARNINGS AND PREPARE FOR GO-LIVE
+5 min

Attendees: Ancillary Business Owner, Distribution Business Analyst,
Customer Services representative, Centre of Expertise representative.

Meeting leader and timekeeper: Business Owner

Please find a suggested meeting agenda below:

1 REVIEW ACTION POINTS FROM HALFWAY CHECK

Check with all participants if all actions that were defined during the Halway Check have been completed.

Time: 5 min

2 REVIEW AND DISCUSS TEMPLATE PHASE 2

Phase 2 focuses on technical how-to's and the roll-out plan. The Customer Services and Centre of Expertise representatives share their concerns. The Business Owner and/or Analyst confirms if the provided information covers the latest situation or if last minute changes are required.

Time: 20 min

3 REVIEW AND DISCUSS DRAFT MATERIALS FROM GOE

Based on the provided information, Customer Services and/or Centre of Expertise may already have created a set-up or a draft of the materials that are going to be shared with the agents. The Business Owner and Business Analyst review this draft.

Time: 10 min

4 SHARE LEARNINGS

What went well during this journey? What should you pay attention next time? Does the situation call for any adaptations to the current process? Give room to all participants to share their thoughts. The Business Owner documents the learnings at the bottom of the Phase 2 template.

Time: 10 min

You have just completed this information journey. Congratulations to you and your team.

Thank you! Let's go live.

5. THE TEMPLATE

A template was designed for both Phases 1 and 2 of the Information Journey. This template covers all information that is generally required by Customer Services and the Centre of Expertise. However, the templates may need adjustment when the situation calls for it.

The next pages display the template. Please find the online version of the template in the Microsoft Teams folder: *Offer Management & Ancillaries > Ancillaries and Upsell > Ancillary Products & Partnerships > Customer Services > Instructions & Template*, or ask one of the Ancillary Business Owners for a link to the template.

PLEASE FIND THE TEMPLATE ON THE NEXT PAGES.

Welcome to this Information Journey! Are you ready to embark?

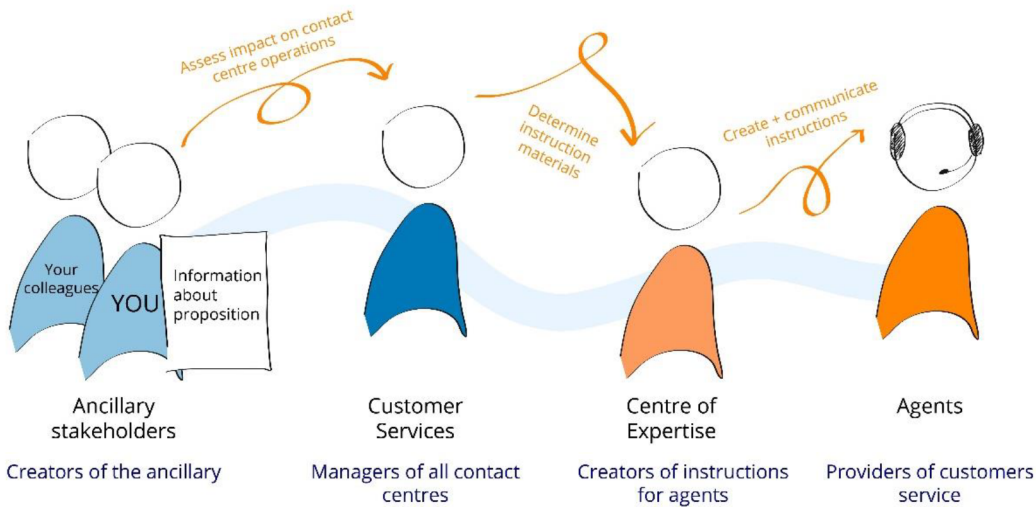
Team name: [name of the proposition]
Expected go-live date: [see epic]
Team captain(s): [responsible Business Owner] + [responsible Business Analyst]
Customer Services contact: [to be filled in by Customer Services]
Centre of Expertise contact: [to be filled in by Customer Services]
Journey created on: XX-XX-XX

Below and on the next page you find a brief introduction to the information journey and an explanation of how to use this document. If you are familiar with the concept, please skip to page 3 to plan the Halfway Check and start the journey.

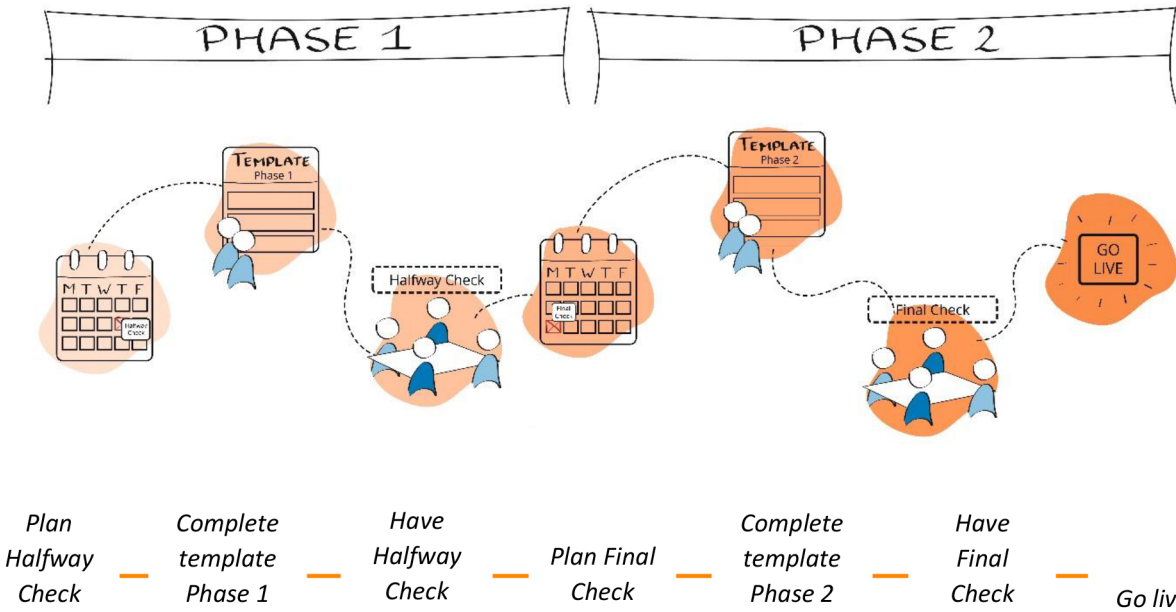


Why go on this journey?
This information journey has been set up to provide a smooth information flow between the ancillary stakeholders and the front-line staff in our contact centres. The ultimate goal is to provide the best possible customer service for all of our (new) ancillary products.

What is your value?
Day in and day out, hundreds of agents are helping our customers all around the world. For our agents, it is essential to receive complete information on time whenever something new is introduced. You and your team possess the information they need. If our agents are not well equipped with the right information to answer customers' questions, our company's image is on the line.



How does this journey work?
On this journey, you work together with the Customer Services department and the Centres of Expertise of the contact centres for a smooth information flow towards the agents. See the visualisation of the flow above. To kick off this journey, the Business Owner plans the Halfway Check meeting with the Business Analyst, the Customer Service contact and the Centre of Expertise contact (see names the previous page).
The journey consists of two phases. Simply put, you and your team complete Phase 1 in this template before the Halfway Check. The goal for Phase 1 is to understand the new proposition and determine what needs to be developed by Customer Services. Subsequently, after the Halfway Check you and your team complete Phase 2 in this template before the Final Check. The goal for Phase 2 is to determine how-to's and define the roll out of the proposition. After the Final Check, the information journey for this proposition has been completed. See a visualisation of the journey steps below.



How to use this document?

The phases consist of a several information items that guide you through the required information. Simply, (together with your team) **answer the questions that are included in each item.**

When working in this document, **make sure that you are logged into your company Microsoft account.** You can work in the document in Microsoft Teams, or open the Teams file in your Word desktop app. Be sure to **turn on the AutoSave option** (top left corner) so your colleagues can immediately see your updates.

Want to know more about this process? See the manual for a more elaborate explanation about the information journey, its background, and tips.

To start, plan your Halfway Check moment approximately two months before your expected go live.

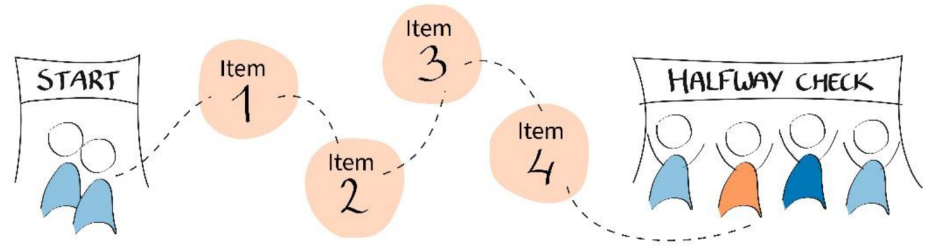
Halfway Check planned on: XX-XX-XX [date to be planned by Business Owner].

Beware, this is your deadline for Phase 1.

You and your team are all set. Let's embark on this Information Journey!

PHASE 1

GOAL: TO UNDERSTAND THE PROPOSITION AND DETERMINE DEVELOPMENTS



Items to be completed in before Halfway Check on: XX-XX-XX [date to be planned by Business Owner]

Phase 1 consists of 4 items and is completed when the when the Halfway Check has been executed (see pages 4 until 9).

The goal of this Phase is to **understand the proposition** and **determine what kind of developments are needed from the side of Customer Services.** The questions are designed to make you think about certain topics and discuss them with your colleagues.

Finish the template by answering all questions and gathering all four stars! The questions do not need to be answered in chronological order. If something is not applicable for your proposition, please put n/a.

ITEM 1
THE OFFER

To be answered by Business Owner and colleagues

- 1. What is the offer?**
[Briefly describe what the offer includes. Please insert link to epic.]
- 2. Why is the offer introduced?**
- 3. Which airline(s) does the offer concern?**
[Is it a joint product? Are partner airlines involved?]
- 4. Which Service Line does the offer concern?**
[e.g. Sales and Services, Business to Trade or Flying Blue?]

An introduction
to Phase 1

The questions that
should be answered
to complete Item 1
of Phase 1

5. On which touchpoints is the offer going to be available?

[Please specify all online and offline touchpoints, cross out the ones that are not applicable]

BW: Search, MyTrip, Check-in

Mobile: EBT, MyTrip, Check-in

Customer Service: OSCAR, CCP

Travel Agents: NDC, GDS

Airport: OSCAR, Kiosk, A2H, Altea DC (check-in), Lounge portal

On board: Myflight, Onboard portal

Additional comments:

6. Who are eligible to buy the offer?

7. What is the fee for buying the offer?

[Or how is the fee determined?]

8. Is the offer going to be available in Miles?



ITEM 2
TECHNICAL DEVELOPMENT

To be answered by Business Analyst and colleagues

1. Does the offer require technical development in one of our tools?

[Please specify for: OSCAR, CCP, Salesforce, NDC, RPS, Tigre, i-Care and Hachiko]

2. Is the offer going to be available in guided and/or cryptic mode?

3. How should the offer be shown in the PNR?

4. Is websupport going to be needed?



ITEM 3
AFTER SALES

To be answered by Business Owner and colleagues

1. What is the refund policy for this offer?
[Is the policy consistent for all touchpoints?]
2. What happens in case of voluntary changes, involuntary changes, and cancellation?
[Is a change fee applicable?]



Thank you for your contribution!
You have now helped to clarify how to help the customer in case of
after sales issues.

ITEM 4
EXPECTED IMPACT

To be answered by Business Owner and colleagues

1. Is the offer a stand-alone product, or is it part of a bundle?
2. Do you expect an impact on the check-in or transfer process?
3. What is the expected effort to sell for our agents?
[i.e. is the offer going to impact the average handling time to help a customer?]



Thank you for your contribution! Congratulations, you have earned
all the stars of Phase I.
You have now helped to assess the impact on our existing processes.

HALFWAY CHECK

GOAL: DISCUSS MAIN CONCERNS, ALIGN STAKEHOLDERS, DEFINE RELEVANT NEXT STEPS

The Information Journey Manual contains a suggested meeting agenda and some meeting tips to help you to run a smooth Halfway Check. This page of the template provides room to note down the next actions and important take-aways that were derived from the meeting. To write down a next action, please specify the definition of the task, the owner, and the timeline. Lastly, specify the date for the Final Check approximately 2 weeks before the expected go-live.

MAIN TAKE-AWAYS FROM HALFWAY CHECK FOCUS POINTS FOR THE NEXT PHASE

To be answered by Business Owner

Action:

Owner:

Timeline:

Action:

Owner:

Timeline:

Action:

Owner:

Timeline:

Other remarks:

.....

To complete Phase 1, plan the Final Check.

Final Check planned on: XX-XX-XX [date to be planned during Halfway Check].

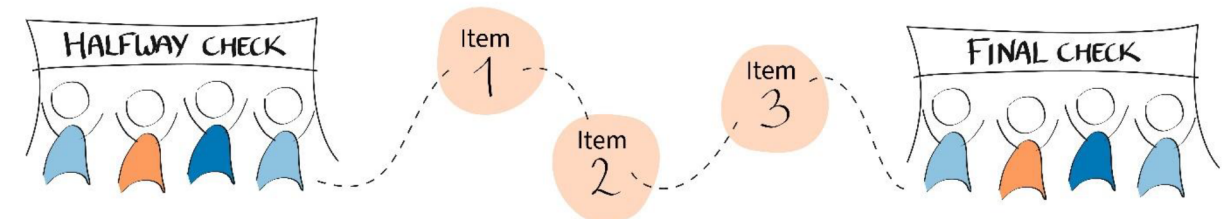
Beware, this is your deadline for Phase 2.

PHASE 1 IS COMPLETED.

KEEP UP THE GOOD WORK!

PHASE 2

GOAL: TO DEFINE THE HOW-TO'S AND THE ROLL-OUT OF THE PROPOSITION



Items to be completed in before Final Check on: XX-XX-XX [date to be filled in by Business Owner]

Phase 2 consists of 3 items and is completed when the when the Final Check has been executed (see pages 10 until 14).

The goal of this Phase is **to define the how to's and the roll-out of the proposition**. Keep the main take-aways from the Halfway Check in mind. These help to give priority to your next tasks. The questions in this Phase require more detailed answers compared to Phase 1.

Finish the template by answering all questions and gathering all the stars! The questions do not need to be answered in chronological order. If something is not applicable for your proposition, please put n/a.

ITEM 1 LOYALTY PROGRAMS

To be answered by Business Owner and colleagues

1. **Are Flying Blue benefits and/or other loyalty program benefits available for the offer?**
[Please specify per tierlevel]

2. Can customers earn Miles and/or XPs and/or other loyalty points when they purchase the offer?

[Please specify per tierlevel]



Thank you for your contribution!
You have now specified how we can serve our loyal customers.

ITEM 2
TECHNICAL INSTRUCTIONS

To be answered by Business Analyst and colleagues

1. Please provide the technical instructions for booking, pricing, managing after sales, and handling errors in OSCAR.

[Please specify if instructions are available in a separate document. Upload this document to the same folder and include link below.]

2. Please provide the instructions for websupport.

[Please specify if instructions are available in a separate document. Upload this document in the same folder and include link below.]



Thank you for your contribution!
You have now helped our agents to work with the offer in our systems.

ITEM 3
ROLL-OUT

To be answered by Business Owner and colleagues

- 1. What is the roll-out plan for this offer?
[E.g. Are pilots or test planned?]
- 2. Does the offer have any scope limitations?
- 3. How is the offer going to be communicated internally?
- 4. How is the offer going to be communicated externally?
- 5. Please provide screenshots of the offer on the website if applicable.
[Or provide a link to the images.]



Thank you for your contribution! Congratulations, you have earned
all the stars of Phase 2.
You have now determined the pre-go-live specifics.

FINAL CHECK

GOAL: REVIEW MATERIALS, SHARE LEARNINGS AND PREPARE FOR GO-LIVE

The Information Journey Manual contains a suggested meeting agenda and some meeting tips to help you to run a smooth Final Check. This journey is a learning process for everyone and can be adjusted according to present needs. This page of the template provides room to note down the main learnings that were discussed during the Final Check and other remarks.

MAIN LEARNINGS FROM FINAL CHECK
FOCUS POINTS FOR FUTURE JOURNEYS

To be answered by Business Owner

Learning:
.....

Learning:
.....

Learning:
.....



PHASE 2 IS COMPLETED.

GREAT JOB, YOU AND YOUR TEAM HAVE FINISHED THE INFORMATION
JOURNEY FOR YOUR NEW PROPOSITION!

NOW LET'S GO LIVE.

6. CLOSING WORDS

This manual aimed to elaborate on the Information Journey concept. The Information Journey provides a structured approach for the ancillary stakeholders, Customer Services and the contact centre Centre of Expertise to transmit information and exchange feedback. This concept was created to improve the information flow and communication between the Ancillary Team and the front-line staff at the contact centres.

The Information Journey was the outcome of a graduation project for the MSc program Strategic Product Design at the Delft University of Technology. The complete thesis report can be found in the TU Delft Student Repository:

Designing the Information Journey: an engaging approach to guide an airline organisation in adequate information transfer to their contact centre staff.

The Information Journey concept is a first step towards improving the information flow and communication between our organisation and the subsidiary contact centres. Perhaps, it can serve as inspiration material for improving communication and information flows between other teams as well.

Graduation project by: Margriet Klinckhamers | TU Delft - Faculty of Industrial Design Engineering

Company supervisor: Clara Soriano Segura | Ancillary Business Owner

Date: April 2023

THANK YOU FOR READING THIS MANUAL.

**GOOD LUCK ON YOUR FUTURE
INFORMATION JOURNEYS!**

