

Journey Intelligence Balanced Scorecard (Version 0.1)

This is an early prototype of a future balanced scorecard for use in Journey Performance, Journey Intelligence and Systemic Service Design. This scorecard is based on (and is indebted to the original method created by: **Kaplan, R.S. and Norton, D.P. (1992, 1996 and 2001)**).

As with all prototypes there **maybe errors in the content, and in the emerging scoring methodology**. Please bear this in mind if you are intending to apply it in a 'real world' context.

If you are testing and trialling the prototype, please send your feedback to: rachel.wood@open.ac.uk

When more fully tested, and the trials are deemed to be successful, it is intended for this method to be converted to a free to use application (under the terms of the creative commons license).

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Evidence-Informed Scoring Guide

Purpose

The Journey Intelligence Balanced Scorecard is designed to help teams transform customer feedback into structured evidence for decision-making.

Unlike traditional scorecards, this framework combines:

- Current Performance (Journey Performance Index)
- Future Improvement Potential (Journey Opportunity Index)
- Confidence in the Evidence (Evidence Confidence Rating)

Together, these provide a balanced assessment of how well a journey is performing, where improvement should be targeted, and how confident the organisation can be in the assessment

Customer Feedback

|



Thematic Analysis

|



Five Journey Intelligence Factors

|



Evidence Review

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Decision Tree

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|



Behaviourally Anchored Scoring

|



Evidence Confidence Rating

|



Journey Performance Index

+

Journey Opportunity Index

|



Strategic Prioritisation

Step 1 – Review the Evidence

Before assigning any score, bring together all available evidence.

Consider:

- ✓ Customer satisfaction data
- ✓ Open-text survey responses
- ✓ Complaints and compliments
- ✓ Operational performance measures
- ✓ Staff insight
- ✓ Observation or research findings
- ✓ Professional judgement

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Step 2 – Use the Decision Tree

Ask the following questions for each Journey Intelligence Factor and each scoring dimension.

Decision Tree

Is the evidence predominantly positive?

Answer Action

Yes Continue to Question 2

Mixed Consider Score 3

No Continue to Question 3

Question 2

Is performance consistently strong?

Answer Suggested Score

Yes 5

Mostly 4

Some variation 3-4

Question 3

Is performance consistently weak?

Answer Suggested Score

Yes 1

Mostly 2

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Answer Suggested Score

Mixed 2-3

Only once the likely range has been identified should the assessor refer to the behavioural descriptions.

Step 3 – Behaviourally Anchored Rating Scales

Desirability

Question

Does this factor create value for customers?

Score Behaviour

- 5 Consistently exceeds customer expectations and creates exceptional value.
- 4 Delivers strong value with only minor improvement opportunities.
- 3 Generally, meets customer needs but is inconsistent.
- 2 Creates limited value with recurring issues.
- 1 Frequently fails to meet customer needs.

Feasibility

Question

Can the organisation realistically improve this factor?

Score Behaviour

- 5 Easily achievable within current capability.
- 4 Readily achievable with modest investment.

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Score Behaviour

- 3 Requires moderate change.
- 2 Significant organisational barriers exist.
- 1 Major structural change required.

Viability

Question

Does improving this factor support organisational and commissioner priorities?

Score Behaviour

- 5 Strong strategic contribution.
- 4 Clear contribution.
- 3 Moderate contribution.
- 2 Limited contribution.
- 1 Little strategic value.

Risk Management

Question

How well are risks understood and managed?

Score Behaviour

- 5 Risks are proactively anticipated and managed.
- 4 Risks are well controlled.
- 3 Risks are understood but only partially managed.
- 2 Risks are inconsistently managed.

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Score Behaviour

- 1 Significant unmanaged risks.

Journey Opportunity

Question

How much opportunity exists to improve this factor?

Score Behaviour

- 5 Transformational opportunity with system-wide impact.
- 4 Significant opportunity.
- 3 Moderate opportunity.
- 2 Limited opportunity.
- 1 Little additional opportunity.

Step 4 - Assess Confidence in the Evidence

Before calculating the indices, assess how much confidence you have in the evidence supporting the scores.

Confidence Definition

Typical Indicators

High (3) The evidence is comprehensive, consistent and triangulated.

Large response volume, consistent themes across qualitative and quantitative data, operational data supports findings, multiple reviewers agree.

Medium (2) The evidence is generally reliable but has some limitations.

Moderate response volume, mostly consistent findings, some gaps or minor disagreement.

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Confidence Definition	Typical Indicators
Low (1)	The evidence is limited, conflicting or incomplete. Small sample, conflicting themes, reliance on anecdotal evidence, limited supporting data.

Important: The confidence rating does not change the scores. It helps decision-makers judge how much weight to place on the findings and where further evidence may be needed.

Step 5 - Calculate the Two Indices

Journey Performance Index (JPI)

Average the four performance dimensions:

- Desirability
- Feasibility
- Viability
- Risk Management

JPI Interpretation

4.5–5.0 Excellent

3.5–4.4 Strong

2.5–3.4 Developing

1.5–2.4 Improvement Required

1.0–1.4 Critical

Journey Opportunity Index (JOI)

The Journey Opportunity score is reported separately.

JOI Interpretation

- 5 Transform
- 4 Prioritise
- 3 Improve
- 2 Optimise
- 1 Maintain

Step 6 - Make the Strategic Decision

Journey Performance	Journey Opportunity	Confidence	Recommended Action
High	High	High	Innovate confidently. Continue investing and scale successful practice.
High	High	Low	Validate before investing. Gather additional evidence to confirm the opportunity.
High	Low	High	Maintain. Sustain performance and monitor over time.
Low	High	High	Prioritise redesign. Focus resources where they are most likely to improve outcomes.



Journey Performance	Journey Opportunity	Confidence	Recommended Action
Low	High	Low	Investigate first. Strengthen the evidence before committing significant investment.
Low	Low	High	Stabilise. Resolve essential operational issues before considering transformation.
Low	Low	Low	Collect more evidence. Avoid major decisions until confidence in the assessment improves.

Facilitator Checklist

Before finalising scores, ask the group:

1. Have we assessed the factor, rather than the service as a whole?
2. Have we considered both quantitative and qualitative evidence?
3. Is there a clear rationale for each score?
4. Have we reached consensus, or documented differing views?
5. Have we recorded our confidence in the evidence?
- 6.** If another team reviewed the same evidence, would they be likely to reach a similar conclusion?

Worked Example

Journey Intelligence Balanced Scorecard

Parenting Education and Support (Illustrative)

Step 1 - Gather the Evidence

Quantitative Satisfaction Results

Measure	Result
Overall satisfaction	78%
Would recommend	82%
Felt listened to	91%
Sessions easy to attend	69%
Received enough follow-up support	54%

Qualitative Comments

The survey collected 240 open-text responses.

Examples included:

"The facilitator never judged me."

"I finally felt somebody understood my situation."

"Booking was confusing."

"The sessions were brilliant, but I didn't know what happened afterwards."

"Different organisations kept asking me the same questions."

"Evening sessions helped because I could arrange childcare."

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Step 2 - Code the Comments

The comments were analysed using thematic analysis.

Journey Intelligence Factor Frequency Overall Pattern

Service Delivery Process	High	Mixed
Human Interaction	Very High	Very Positive
Outcome & Resolution	Medium	Mixed
Customer Experience	High	Positive
Systems & Structural Factors	Medium	Negative

Step 3 - Score Each Factor

Factor 1

Service Delivery Process

Evidence

Positive

- Flexible appointment times
- Online resources
- Accessible venues

Negative

- Booking system confusing
- Waiting times
- Inconsistent reminders

Score

Dimension	Score	Reason
Desirability	4	Parents value flexible delivery.
Feasibility	4	Improvements achievable through process redesign.
Viability	4	Supports commissioner objectives around access.
Journey Opportunity	5	Booking and communication could significantly improve the journey.
Risk Management	4	Operational risks understood and manageable.

Journey Performance Index

Average

$$(4+4+4+4)/4$$

= **4.0**

Journey Opportunity Index

5

Interpretation

The service delivery process is already performing reasonably well but has considerable opportunity for optimisation.

Suggested Actions

- Simplify booking
- Introduce appointment reminders
- Reduce waiting times

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- Improve digital accessibility

Factor 2

Human Interaction

Evidence

Positive

- Empathy
- Respect
- Trust
- Active listening

Negative

Very few comments.

Score

Dimension	Score
Desirability	5
Feasibility	5
Viability	5
Journey Opportunity	3
Risk Management	5

Journey Performance Index

$(5+5+5+5)/4$

= **5.0**

Journey Opportunity

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3

Interpretation

Excellent performance.

Lower opportunity because the service is already strong.

Suggested Actions

- Maintain practice.
- Capture good practice.
- Use facilitators as mentors.

Factor 3

Outcome & Resolution

Evidence

Mixed.

Parents completed programmes successfully but wanted more follow-up.

Scores

Dimension	Score
Desirability	3
Feasibility	3
Viability	4
Journey Opportunity	5
Risk Management	3

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Journey Performance Index

3.25

Journey Opportunity

5

Interpretation

A major opportunity.

The programme itself works.

The transition afterwards does not.

Suggested Actions

- Six-month follow-up
- Peer support
- Referral pathways
- Digital check-ins

Factor 4

Customer Experience

Evidence

Positive emotions.

Growing confidence.

Reduced anxiety.

Still some uncertainty.

Scores

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Dimension	Score
Desirability	4
Feasibility	3
Viability	4
Journey Opportunity	4
Risk Management	3

Journey Performance Index

3.5

Journey Opportunity

4

Interpretation

Positive emotional journey.

Opportunity exists to strengthen confidence beyond programme completion.

Suggested Actions

- Success stories
- Alumni network
- Peer communities

Factor 5

Systems & Structural Factors

Evidence

Repeated referrals.

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Poor information sharing.

Fragmented pathways.

Parents repeatedly telling their story.

Scores

Dimension	Score
Desirability	2
Feasibility	2
Viability	5
Journey Opportunity	5
Risk Management	2

Journey Performance Index

2.75

Journey Opportunity

5

Interpretation

This is the biggest systemic weakness.

Suggested Actions

- Integrated referral pathway
- Shared assessment
- Cross-agency governance

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- Journey ownership
- Digital information sharing

Step 4 – Compare the Two Indices

Factor	Journey Performance Index	Journey Opportunity Index	Priority
Service Delivery Process	4.00	5	Improve
Human Interaction	5.00	3	Maintain
Outcome & Resolution	3.25	5	Prioritise
Customer Experience	3.50	4	Improve
Systems & Structural Factors	2.75	5	Transform

Step 5 – Translate Scores into Action

The scorecard should not be viewed as an end in itself. Its purpose is to support structured conversations about where improvement effort should be directed.

In this example, **Human Interaction** demonstrates exemplary performance and should be sustained through ongoing staff development and the sharing of good practice.

Service Delivery Process performs well overall, but the high Journey Opportunity Index suggests that relatively modest changes—such as simplifying booking, improving reminders, and reducing waiting times—could produce noticeable improvements in customer experience.

Outcome & Resolution represents a higher priority. While parents value the programme itself, many feel unsupported once it ends. This indicates that redesigning follow-up pathways, strengthening peer support, and improving transition arrangements could significantly enhance longer-term outcomes.

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Customer Experience is generally positive, but there is scope to increase confidence and reduce uncertainty by extending support beyond programme completion and recognising progress throughout the journey.

Finally, **Systems & Structural Factors** emerge as the most strategic priority. Although these issues are less visible to customers than frontline interactions, fragmented referrals and poor cross-agency coordination have a substantial impact on the overall experience. Addressing these systemic barriers is likely to generate benefits across multiple stages of the journey and should therefore be prioritised for cross-organisational redesign.

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