

Phases of the Customer Journey

This attachment summarizes the phases of the Customer Journey Framework, which guides customers from initial engagement through follow-up. The journey is the same for all customers; the only difference is the point of enrollment. Phase 4 may include the Training and Education Assessment (TEA) and Work-Based Learning Assessment (WBLA), depending on the customer's identified services.

Phase	Purpose	Action Needed	Customer Status
Phase 0 – Universal Access and Basic Career Services	Provide all customers with access to workforce information, resources, and basic career services.	Welcome the customer, provide orientation, share available services and resources, and answer initial questions.	Customer has made initial contact and is exploring available services.
Phase 1 – Intake and Initial Engagement	Collect customer information and begin building a relationship to identify workforce needs.	Complete intake forms, gather required information, explain the program, and determine next steps.	Customer has expressed interest and is engaged in the intake process.
Phase 2 – Eligibility Determination and Certification	Verify eligibility for program participation and complete enrollment requirements.	Review documentation, verify eligibility criteria, certify enrollment, and document the determination.	Customer is determined eligible and officially enrolled (or referred if ineligible).
Phase 3 – Assessment (Getting Started Assessment - GSA)	Evaluate the customer's skills, interests, abilities, barriers, and service needs.	Conduct assessments, review employment history, identify strengths and barriers, and document findings.	Customer's needs and goals have been assessed and are ready for planning.
Phase 4 – Universal Career Planning	Develop an individualized career plan that supports the customer's employment and training goals.	Collaborate with the customer to establish goals, identify services, develop the career plan, and document agreed-upon activities.	Customer has an approved career plan and is prepared to begin services.
Phase 5 – Service Delivery and Monitoring	Deliver planned services while monitoring progress toward employment and training goals.	Provide career, training, and supportive services; monitor participation; update documentation; and modify the plan as needed.	Customer is actively participating in services and progressing toward goals.
Phase 6 – Transition/Exit	Prepare the customer for successful completion of services and transition to employment, education, or other opportunities.	Confirm goal attainment, coordinate placement or referrals, complete exit planning, and provide transition support.	Customer is completing services and transitioning to employment, education, or another appropriate outcome.
Phase 7 – Follow-Up	Maintain contact after exit to support retention, continued success, and outcome tracking.	Conduct follow-up contacts, provide additional assistance or referrals as needed, document outcomes, and encourage continued success.	Customer has exited the program and is receiving follow-up services.