The Customer Experience Playbook

Leadent
potential made real

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The Tool For a Customer Centric Business

We've created the Customer Experience Playbook as an entry point to help you understand how to understand customer experience from the perspective of operations.

We will provide you with some tools and approaches to help make your business more customer centric and drive the voice of the customer at the heart of your business.

At Leadent we work with service businesses day in day out. As a result we understand the need to meet regulatory requirements, ensure compliance, drive an efficient and highly utilised field force, all whilst enabling a superb customer experience.

This Playbook will help you to think differently and become a catalyst for transformation in your organisation.

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What is Customer Experience?

Every business has one, but not all businesses have the right one. I am of course talking about customer experience. It's so much more than a simple process; it's every interaction that your customer has with your business, from your website to your contact centre.

A successful customer experience is based on clear articulation of a proposition that meets a customer need. Customers can include external consumers, business customers, partners, suppliers and in a related way your employees.

Excellent customer experiences are founded in the tangible building blocks of your business, usually elements within your control. They might be your digital channels such as your website, social media, the apps your customers use to pay a bill, or your contact centre and field service employees.

They might be printed media like statements or contracts, or they might be physical manifestations of your brand like retail units or asset locations. These are all touchpoints of your customer experience and can be identified, evaluated, improved and integrated.

Let's not pretend...true customer experience transformation can be really challenging.

It's all too easy to pay lip service in a workshop without making any sustained changes in your business. Crafting a great customer experience requires significant collaboration across different parts of your company.

It can require a shift in your strategy to deliver products, services and processes that are based on meeting customer needs; or it can require a culture shift so that employees reflect customer-centric values, and are motivated to deepen customer relationships.

It can also require organisational change to break down silos and allow your business to work cross-functionally in teams or task forces that live and breathe your customer needs, and are change agents to make them a reality.

Why Change?

Most sectors are experiencing unprecedented change due to digitisation and the evolution of customer expectations. New technologies are grabbing the headlines and traditional operating models are getting disrupted through collaborative and crowdsourced models, interconnected networks of partners, platforms or start-ups bringing innovative solutions to market.

Artificial intelligence (AI) is moving from the back-end to the front-end of organisations and their interactions with customers. For example, chatbots are being used for customer service messaging interactions by the likes of American Express, KLM, General Electric and Ticketmaster.

It is (optimistically) predicted that 85% of customer interactions will be managed without a human by 2020. From autonomous driving vehicles to live translations using artificial neural networks, artificial intelligence will continue to drive new levels of customer engagement.

Digitally driven operating models are accelerating change for organisations and consumers.

Think of the roll out of smart meters in the UK; at its simplest the smart meter home display will give consumers greater visibility of their energy consumption.

The future smart meter, however, will enable the adoption of more flexible time of use tariffs and switching; the uptake of consumer demand side technologies such as grid connected battery storage; smart connected appliances and the enablement of smart grids. When deployed at scale, smart grids at a city level could operate at twice the efficiency of legacy electrical grids, and by 2050 could be worth approximately £13 billion and £5 billion in exports. Digital models like these are already blurring traditional industry boundaries and changing the game for the consumer.

Digital platforms are also driving business model disruption, causing changes in marketing, finance, innovation, operations and strategy. The increased uptake of cloud and on-demand services has eliminated traditional market entry barriers and is leveling the competitive landscape for start-ups.

To illustrate the point, take the much quoted statement that *"Uber, the world's largest taxi company, owns no vehicles. Facebook, the world's most popular media owner, creates no content. Alibaba, the most valuable retailer, has no inventory; and Airbnb, the world's largest accommodation provider, owns no real estate."*

These are all platform based, requiring nothing more than code to exist. In addition, 70% of so-called 'unicorn' start-ups were platform companies in 2015, so the trend will run and run.

The interface and customer experience are driving the value, whereas traditionally hardware or product would have driven value. For example, iTunes generates profit by being the thin software between the music industry and the music retailer. Phillips Hue smart lighting translates a commoditised light bulb to an interactive connected lighting system.

Taking logistics as an example, the Uber model also points towards the rise of operations based on crowdsourcing and sharing economy approaches. For example, crowdshippers (such as UberCARGO, Friendshipper and Roadie) and local delivery networks (such as Doordash and Postmates) are enabling asset-light, low fixed-cost models that disrupt the last mile delivery model. Organisations like Keychain Logistics are creating a business shipping marketplace where users can manage the end to end of their shipments to find and aggregate delivery across warehouses, hubs, depots and delivery providers.

The sharing economy, currently worth £7 billion per year is forecast to be worth £140 billion per year in the UK alone by 2025.

The past couple of decades have also shown a rapid development of the routes to market of B2C and B2B organisations, and the experience and expectations of their customers and employees.

Innovative companies now accept they need a seamless multi-channel user experience, taking the elements of each channel that their customers or employees value most, and combining them to deliver a more valuable experience overall.

The expectations of the so-called 'digital natives' means that companies must keep up with the pace of change and deliver a digital experience across all of their channels, or lose customer trust and relevance.

> *The past couple of decades have also shown a **rapid development of the routes to market of B2C and B2B organisations** and the experience and expectations of their customers and employees.*
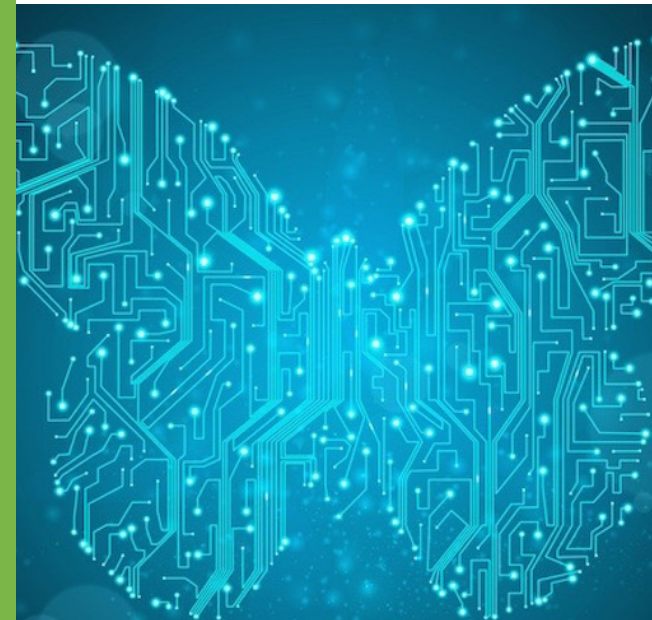
What Does this Mean for Operations?

Well, in short, many things – from operations software, processes, logistics and supply chain to field service models.

The software landscape is no longer limited to large ERP-type vendors but is increasingly disrupted by agile market innovators. A number of start-ups are looking to combine the internet of things, analytics and machine learning to bring new solutions to market. These solutions are typically cloud-based and harness big data analytics, process measurement, sensor-based hardware and IoT monitoring to aggregate and display operational performance information.

Industries with complex operations (such as telecoms, energy and water utilities) have been connecting networked devices for some time, securely leveraging field and sensor data to manage assets and diagnose faults.

IoT funding in the UK is being driven across multiple use cases including smart street lighting, smart cities and fleet telematics. IoT will provide operations transparency and visibility across spares and parts delivery; even greater transparency of asset condition and performance and the opportunity to further automate business processes to eliminate manual interventions.

Wearable technologies have long been hyped for mass adoption. Wearables are undergoing transformation – focusing on better data insight, better technology and better mobile integration. Within warehousing, hardware and software solutions have been developed using head-mounted displays, with real-time object recognition, barcode reading, indoor navigation and seamless systems integration. AR traffic systems are also being developed to allow dynamic traffic support and visual re-routing. AR can also be leveraged to identify buildings and entrances as well as indoor navigation for faster delivery and installation at site.

"Field Service software is still getting smarter and leveraging mobility and analytics to drive decision making"

Field service management continues to look for new applications of technology to improve efficiency, resource utilisation, quality of service and field performance metrics.

Organisations with field operations are increasingly leveraging asset insights to better model requirements, consolidate shipments and position inventory in better locations. Heads-up display devices can deliver instructions and schematics in front of a field technician's face or overlaid on the asset being serviced. Field service software itself is still getting smarter and leveraging mobility and analytics to drive decision making. Warehousing is receiving a lot of technology focus through the push to automation, robotics and autonomous vehicles.

Customers who raise a problem to their service provider want to know that it will be seamlessly and successfully resolved, whatever channel they interact with. They want to be able to self-serve an appointment at a date and time of their choosing. When an engineer is to be dispatched, the customer increasingly wants to know who will solve their issue, when that engineer will arrive, and what services will be performed when they are there.

Field engineers have therefore become the brand ambassadors for the service organisation. Alongside delivering a productive, right first time work order, they need the right tools, information, and skills to efficiently resolve any issues that may arise.

Operations businesses are therefore critical to the overall customer experience. Customers increasingly make clear their expectations of quality and bring the sum of their service interactions (whether e-tailers, crowdsourcers, technology platform operators or digital innovators) to bear on operational businesses.

A good field service experience can make all the difference in determining customer commitment and loyalty. Organisations achieving 90 percent or higher customer satisfaction typically achieve:

- An annual 6% growth in service revenue
- 4% growth in overall revenue, and
- 89% resulting level of customer retention

Surely you can't afford to miss out on this opportunity to embrace digital and better deliver against your customer needs? Over the next few pages we'll tell you how.

Why You Need a Customer Experience Playbook

Customer experience is at the heart of all of these trends and resulting business opportunities.

A customer experience aggregates the complete set of interactions that a consumer has with your brand for any given task or decision. This may comprise one or many customer journeys. Customer journeys are usually cross-functional by nature. They might start offline and finish online, or start in your sales department and end in your service department. They don't respect traditional organisational boundaries and changing this dynamic can be hard.

Most customer experience programmes are initially positioned as strategic (driven by a Board member or Chief Executive), but quickly uncouple from business objectives and outcomes, and shift to tactical measurement of customer metrics and net promoter score. As with any change programme a customer experience programme needs:

1. The right approach from the outset – ideas, innovation and transformation are essential
2. Real business benefit – the outcomes are what matter
3. The right commitment – in a sustained way with shared empowerment across the team!
4. Cross-business engagement – breaking down the silos through facilitated collaboration and the right expertise in place
5. Momentum to make them happen and keep making it happen

You need a Customer Experience Playbook to avoid these pitfalls and gear your own customer experience transformation up for success.
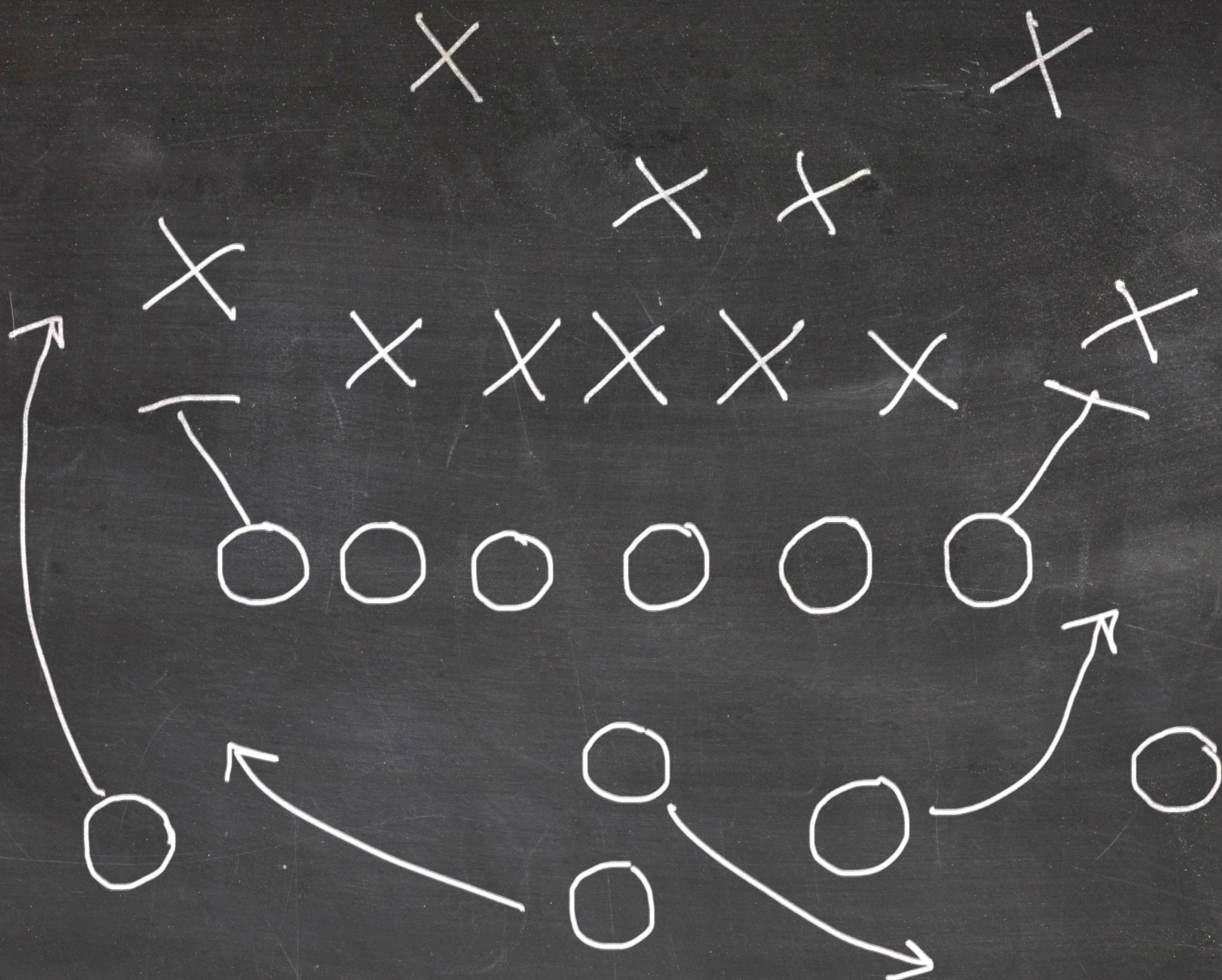
Introducing the Six Plays

In sports, a playbook holds the key strategies and approaches used by a team. Like a sports team, customer experience transformation requires a motivated, high performance team, working together (potentially with coaching) to deliver a new idea.

We've boiled down our experience into six plays. In this guide we'll only have space to consid each at a high level, but we're happy to have a more detailed conversation with you.

Our approach to customer experience is based on the following:

06 Scale and Transform

Scale ideas or opportunities that have performed well.

Support or lead transformation, implementation and change management activity in order to sustain momentum.

01 Research

Developing nuanced understanding of needs, trends and touchpoints

02 Understand

Define and visually document the needs, perceptions and interactions customers have across a client organisation.

Tools: Customer Journey Mapping and Future User Maps.

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Customer Experience Method

05 Measure and Improve

Support clients in measuring the impact of any prototypes to assess whether improvements add value and whether benefits are being achieved.

Tools: Evaluation and feedback, blueprinting, operating model.

04 Proto-Type

Support the testing of high potential ideas with customers through medium fidelity prototypes. Pivot and improve resulting approach.

03 Create and Shape

Prioritise pain points and delight factors and start to develop plans, outline business cases and establish a transformation programme (as relevant).

Tools: Vision statement, business cases, planning and idea mockups.

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The Six Plays

1. Do Your Research

The objective of research in this context, is to develop a nuanced understanding of the needs, trends and macro environment within which your customers operate. It might also involve an understanding of your own organisation and the channels and touch points that customers would use. It is likely to involve an evidence base to setup, shape and define the methodology to be used for your customer experience transformation, alongside effective ways to embed and sustain the change.

2. Understand the Customer

Building on your research you'll need to define and visually document the needs, perceptions and interactions your customers have across your organisation.

3. Create and Shape

Customer journey maps will help to demonstrate pain points and delight factors, but these will need to be prioritised and converted into plans for implementable prototypes.

4. Soft Launch / Prototype

High potential ideas will be tested with actual customers through low and medium fidelity prototypes. You will need to understand how customers respond to the proposed customer experience changes and pivot your approach according to the result and desired outcomes.

5. Measure Results and Improve

The impact of any prototypes will need measuring to assess whether the improvements add value and whether benefits are being achieved. Measurement will either lead to scale up or the need for more research and iterations. You will need to be flexible to accommodate either and cycle back round the loop as needed

6. Scale and Transform

Successful prototypes that have performed well will receive the green light to be scaled up. They will be grouped as a programme of transformation and their implementation managed as a change programme across your business, in order to sustain momentum.

Let's now take each play in turn. As we go, we'll give you some theory, application and tools.

Play One: Do Your Research

Understanding your customers is a vital part of improving your customer experience. You might already have sources of customer research through customer satisfaction surveys, product feedback or feedback from sales and account teams.

But whilst this sort of information can be analysed to help you determine trends, you should focus on ways to uncover elements that most influence the personal motivations and drivers of your customers including their needs, wants and aspirations in the context of their perceptions of your organisation and your industry. Armed with this knowledge, you can design more effective products, services and customer experiences, and increase the value you provide.

There is no shortage of methods and tools for conducting customer research. Which ones you use for your customer experience programme will depend on your customers, your relationships with them, the channels they utilise, the degree of loyalty they have with your organisation and the best environment to understand their needs.

Step One – Chose your research methods
Some of the methods we like to use are:

Approach	Application	Observations
Customer Interviews	Direct interviews with customers or small customer groups, ideally in their usual environment	Receive direct feedback and customer context. Can be hard to analyse the volume of information received
Customer Information	Direct interaction with customers, shadowing them in an area relevant to their interaction with your organisation	Time consuming but can generate valuable insight, including context and decision making
Customer Profiling	Evaluating the consumer by (either primary or secondary) profiling the broader context of their lives	Depends on method but can give a boader context of the customer and their needs
Documenting Touch Points	Writing down a customers' formal and informal touch points within your organisation	A structured approach but can be limited by the documentation method and biased to current ways of thinking
Fly on the Wall	Observing the customer (via unobtrusive methods) over a period of time to observe engagement approach, tools, systems	Need to remain discreet, whilst not impacting the usual way in which the customer would interact with your organisation
Customer Workshops	Usually used to bring together findings and test emerging customer hypotheses to frame a problem statement	Requires openess and transparency when involving customers or stakeholders
Quantative Research	Various approaches including surveys, A/B testing, customer satisfaction surveys, pricing research	Typically, large sample sizes but more narrow scope of questioning and can be expensive to set up
Market and Competitor Research	Again, various approaches but could involve research into your industry, market segments, competitor approaches and the customer needs serviced by them	Research and insight can take time and not always directly relevant to customer experience

Each of these have their advantages, but typically a research phase will use a combination of methods.

Getting perspective on your customers

We find it is rare to be able to be able to understand your customers (and develop a 'killer idea') without learning the problem space properly. By immersing yourself in the context of your customers' problems you may start to see patterns emerging and make a deeper level of connection. There is always value in looking backwards before you look forwards.

Once you identify the met or unmet needs of your customers, interpret how they go about making decisions and understand which channels they are inclined to use or interact with to engage with your organisation; you will greatly expand the range of opportunities you have for influencing the way those customers perceive your brand, your products or services and your company.

Getting perspective on your customers is grounded in an information-driven understanding of your customers and the problem you are hoping to address.

This might include the questions:

- What is the big picture or context of this topic?
- What previous ideas or opportunities have been addressed before?
- What are the dimensions of the current perceived problems or opportunities?
- How do macro, political, economic, social or technological trends shape the problem or opportunities?
- What has led up to the current status quo and where do the future opportunities lie?
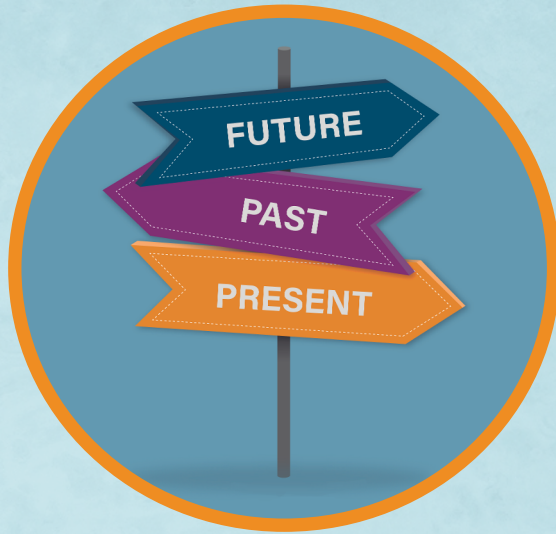
Tools for context mapping

Context mapping takes a holistic perspective; it should involve the user as 'expert of his or her experience', and involve a range of tools and approaches that enable users and customers to articulate their expertise (or put the programme team in the customer's shoes).

Which factors are important will depend on the goals and scope of the programme as a whole. Some tools that we like to use include:

Visual triggers

Typically sheets with ambiguous words and pictures trigger users to recall memories and associations.

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Memory mapping

Brings out their tacit knowledge and latent needs, which form the basis for designing the future product.

Mind mapping

Can be utilised during the context mapping process for the customer experience programme team to capture information arising during workshops, customer and user discovery sessions.

Workshop techniques

Before user context sessions users may receive a 'sensitising package', which helps them observe their own lives and reflect on their experience of the topic to be workshopped.

This might include drawing and practical materials such as an exercise book, a camera and maps. These tools may be used in advance to bring into the workshop to discuss with the facilitators or may be developed during the workshop.

Workshop sessions might take place in an agreed location or the user's home or work location. A number of exercises would typically be conducted to gradually deepen the insights about the topic being understood. This might include discussion and presentation, creative exercises, image and word association, developing mock-ups and so on depending on the topic.

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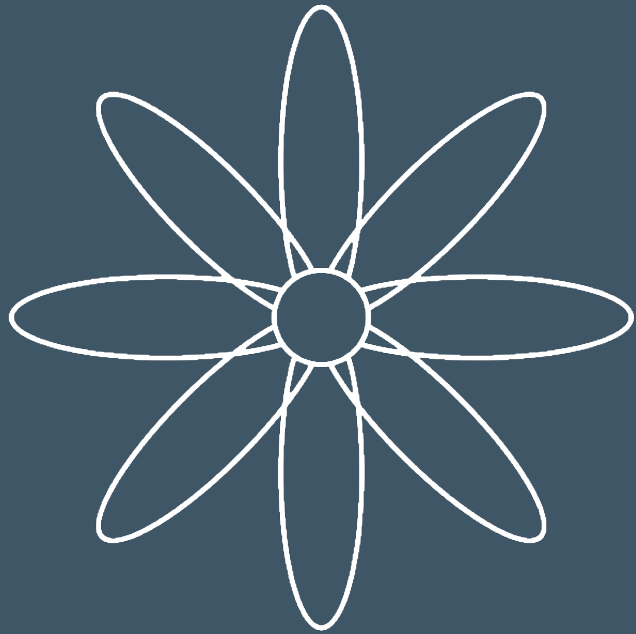
Context mapping

Context mapping provides a focus on the 'top' themes or dimensions of a particular topic or opportunity space, allowing for easy documentation of eight dimensions of a current problem or opportunity space.

The process should include:

1) Agree a broad topic or opportunity area for the programme team to review

2) Discuss the topic and include points of intense discussion or consensus on the context map

3) Note side topics around the map and repeat the process until the team arrives at a map to capture the problem spaced

4) Review which dimension was discussed for longest or generated most questions.

Progression curves

These represent what changes when over a period of time. They will help to place industry or competitor developments and innovations across a period of time set alongside industry lifecycles or other historical or user events. Multiple layers of data may help the programme team to observe patterns and understand the pace of changes that have led to the present. This can also help to refine the problem statement itself.
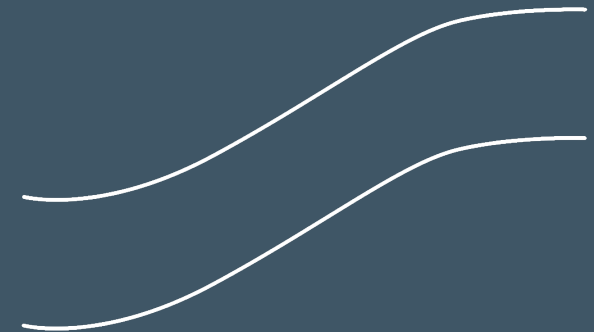
Play Two: Understand the Customer

As you will have seen in the previous play, there is no hard and fast rule on which tools and techniques to use to gain a better understanding of your customer and their needs. Rather, any approaches you take will need to be multi-layered and holistic approach.

It is important to remember that your customers and users have experienced their context uniquely; they are the prime source of information about its many facets. Their knowledge may be hidden below the surface or be hard to understand immediately. Observation and discussion during workshops are invaluable but it is worth remembering that they can only portray the 'here and now' – the elements that the customer is prepared or able to express or display. Deeper layers of meaning, things that can be expected to be still valid in the future, will need to be understood by calling up memories from the past (often with associated positive and negative connotations).

Assembling the big picture of how and why your customers are interacting with different channels, touch points, products and services is where your customer experience journey begins. Conducting new research into your customers' needs takes more investment of time and money but is a critical step in the experience mapping process and should ideally be done iteratively. Never rely on just one data source. Triangulate your problem area to get the full picture and keep questioning any knowledge gaps that arise.

The key building blocks shown in the chart above are 'Say' 'Think' 'Do' 'Use' 'Know' and 'Feel'. But to understand the full context of customer experience you should also consider 'Place', 'Time', 'Devices', and 'Relationships' alongside overlaying the Channel (s) with which your customers interact and their individual experience touch points!

Tacit / Observable:
Recollected or observed practice

DO   USE

THINK   KNOW

SAY   FEEL

Explicit:
Captured in workshops and interviews

Latent:
Recalled from memories

Mapping the Experience

What is a customer journey map?

A visual or graphical interpretation of the overall story from an individual's perspective of their relationship with an organisation, service, product or brand, over time and across the channels they utilise. The story is told from the customer's perspective, but also emphasises important intersections between user expectations and business requirements.

No two journey maps are alike, and regardless of format they will allow you to consider interactions from your customers' points of view, instead of taking a business outwards focus. They can be used in both current state review and future state visioning to examine the present, highlight pain points and uncover the most significant opportunities for building a better experience for customers.

The process of customer experience mapping is a joint activity – the process itself being just as important as the actual artefact. The discussions that experience mapping fosters and the consensus it builds are important building blocks to any future customer experience transformation action.

There is no single way to map customer journeys nor is there any one right answer.

The DNA of a customer journey map

There are some common elements you will need to include regardless of the presentation of the map itself:
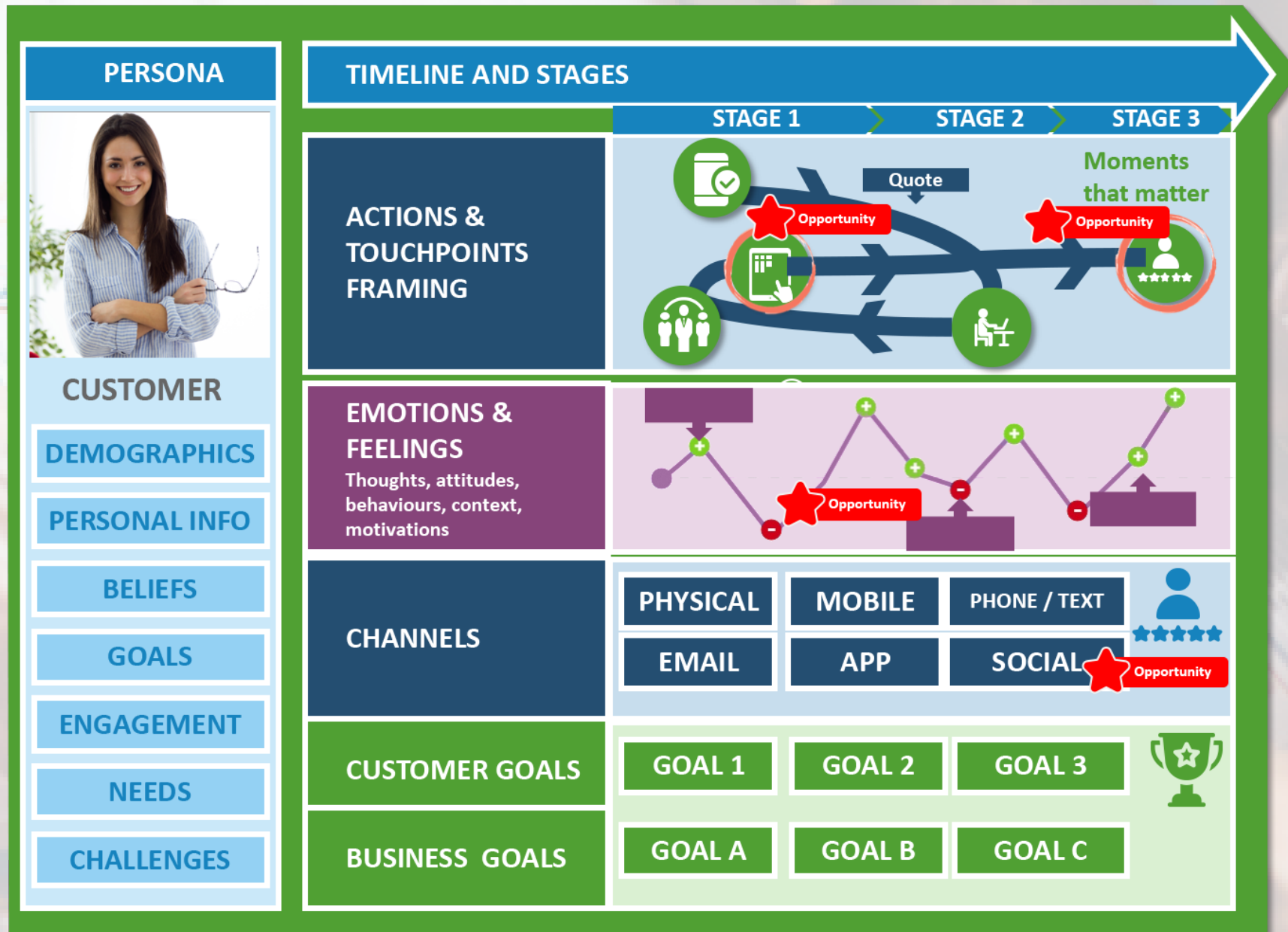
- **Persona**: The main characters that illustrate the needs, goals, thoughts, feelings, opinions, expectations, and pain points of the user. The persona is an overriding filter through which you view and orientate the journey
- **Timeline**: Each journey will be bounded by a finite amount of time (e.g. 1 week or 1 year) or variable phases (e.g. awareness, decision-making, purchase, renewal)
- **Emotion:**Typically a visual depiction of the changing levels of positive and negative emotion or experience across the timeline
- **Touch points**: Customer actions and interactions with your organisation. This may include a visual flow of what your customers are actually doing across the map.
- **Channels**: Where interaction takes place and where they engage your organisation (e.g. website, app, social media, call centre, retail store, aftersales, support)

You may also look to highlight:

- **Findings and Opportunities**: Summarises key findings from the experience mapping process, whether strategic, design-based or more detailed next steps. Useful capture of opportunities as you work.
- **Moments of truth**: Also known as 'moments that matter' these are positive interaction (s) that leave a lasting impression; often planned for a touch point known to generate customer frustration
- **Supporting actors:**Other individuals (e.g. friends, colleagues, third parties) who may contribute to the experience
- **Customer goals:**Definition of customer goals at that stage of the journey
- **Business goals**: Business goals (and / or key performance indicators) at that stage of the journey and organisational accountabilities to deliver
- **Weaknesses**: How does your organisation let the customer down at this stage?
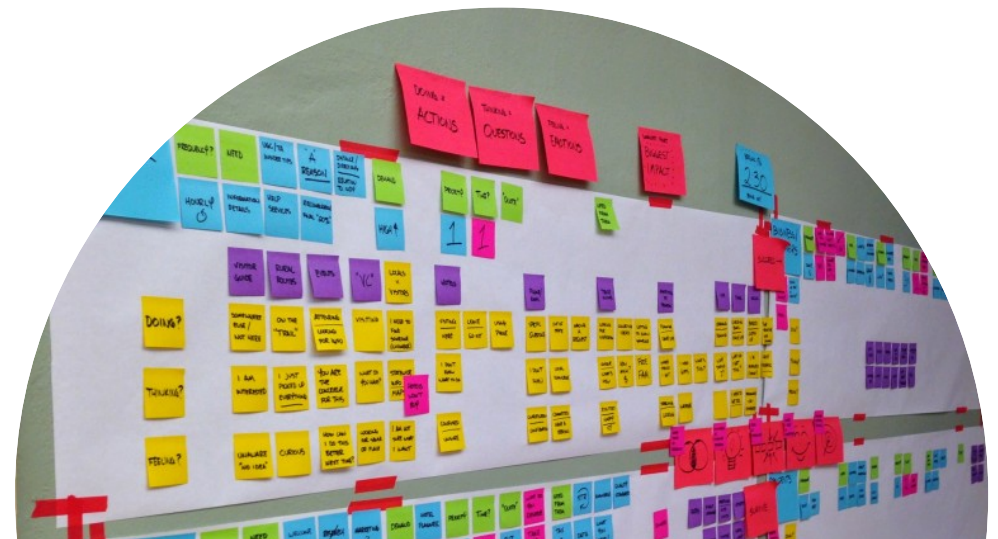
Creating the customer journey map

The customer journey map is a visual narrative of the customer journey. A well crafted output is typically a visually engaging infographic that is easy to understand. It visually illustrates customer's approach, needs and perceptions throughout their interaction and relationship with your organisation. Needs are functional and emotional.

Facilitating the process

An experienced facilitator is usually important to get the most out of a customer journey mapping session. They can help ensure that the right tools and method are applied and be a neutral member of the group with no agendas other than ensuring the right outputs. In order to facilitate the process, it is important to:

- **Introduce yourself** to everyone in the group and form a team mentality
- **Manage group dynamic** to everyone to participate equally
- **Equip the group** with appropriate materials at each step of activity.
- **Provide positive feedback** and encouragement to the group to keep participation levels high
- **Explain the process** and answer questions where needed

There is no single answer for structuring your session, but as a guide you will want to cover:

1. **Objectives for the workshop -** Focus, timings, attendees and success criteria including the outputs intended
2. **Context Setting -** Typically some form of group orientation to the problem space, customer personas and to brief the group on prior discovery and customer research activity
3. **Team Forming -** Dividing participants into teams of four to six ensuring each has a balance of roles, seniority, customer experience and functions. Get the team working together.
4. **Persona Orientation -** focus attendees on exploring the dimensions of the persona to be used as the lens for the customer journey, including any verbatims from real feedback.
5. **Starting the Journey -** Encourage each team to go through the research notes and their understanding systematically and pull out the post-it-note points for each of the customer journey map areas (see above).
6. **Assemble the Journey Map -** Use nominated people from each team to move the post-it notes to a large form template of the customer journey outline.
7. **Consolidate -** Work together as a large group, consolidate, challenge and iterate the emerging journey map, seeking relationships amongst the findings of each group.
8. **Finalise -** By the end of the session, start to draw out insights and opportunities structured around an agreed (or draft) Journey Map for the nominated persona.
9. **Summarise -** Review achievements and highlight next steps and how the work will be progressed (whether by the same team or not).
10. **Sketch the Map -** Building the map itself will take time. Whether in or outside of the workshop be sure to walk it through with others and iterate and edit as you go. For longer sessions (ideally 1.5 days) the second half day can be used to develop and refine the sketched draft of the map itself.

Hints and Tips

Map the whole experience

Map the experience from beginning to end and be as comprehensive as you can. Ideally one touchline will cover the entire experience but if this is too complex you can map a touchline for each key customer interaction. Try to think beyond the obvious and look before and after the immediate touch points with your organisation.

Ensure goals are clear

Engagement is important. It will be very unlikely to create a detailed customer journey map in a day. Instead expect to complete a draft of a single journey for one type of user in a day and make sure the right level of input, co-creation and buy in during the workshop session.

Don't get stuck on the detail

You are not trying to create a realistic representation of every customer's individual experience. Instead you are trying to tell a story and depict the overall shape. There simply needs to be enough detail to describe the journey, identify weak points and highlight opportunities.

Designing the Experience - Example WOW
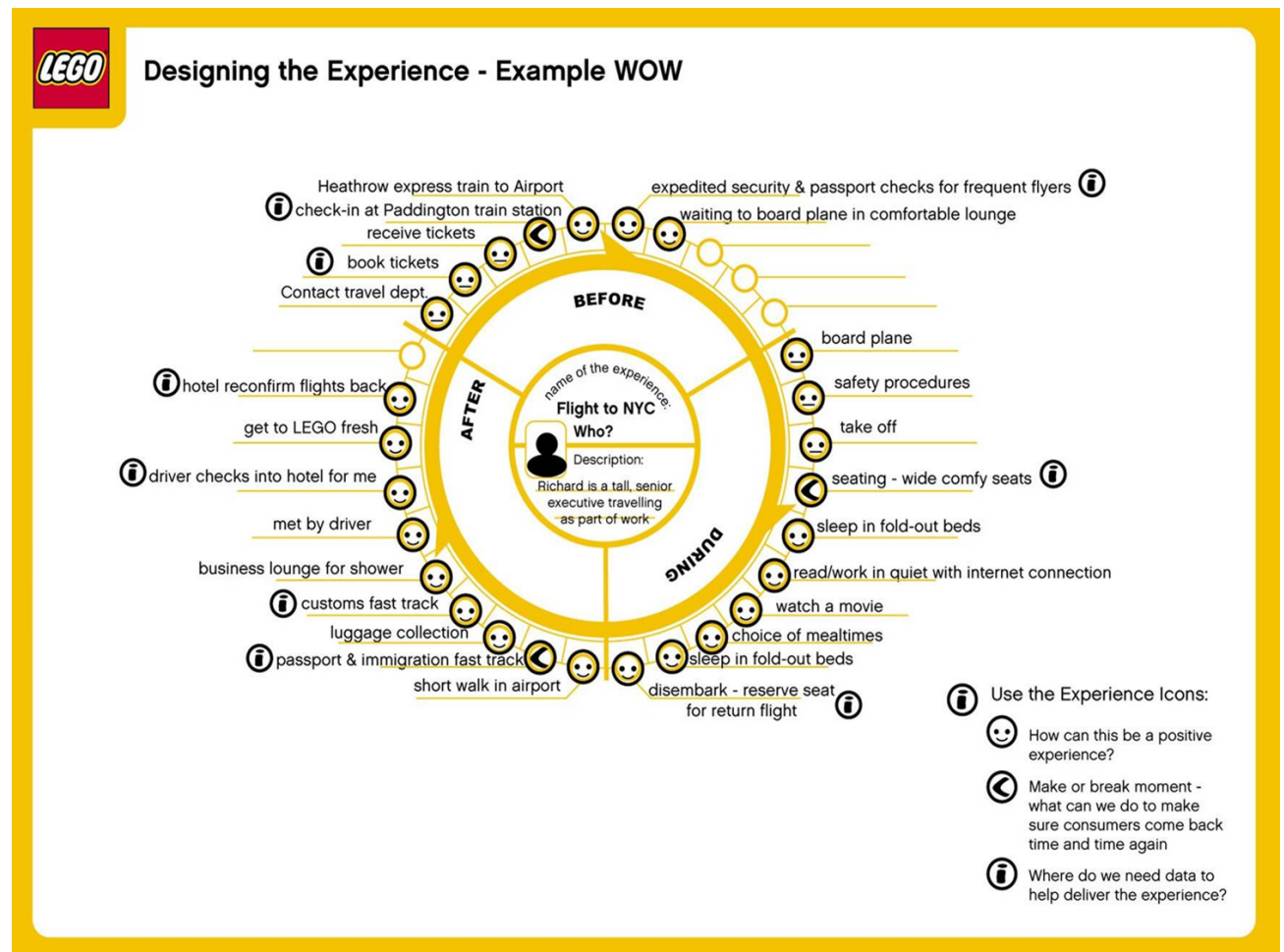
Get the people mix right

It's worth remembering that the process is also about buy-in and education. It focuses minds on the importance of the customer experience and educates participants, so they better understand how to meet the needs of their customers. You will need the right mix of senior management and operational staff in your workshops. Senior management may be more removed from the customer but will take decisions that impact them and it is important they understand the consequence of these actions. Individuals who interact with customers day in day out will give detail and context to the sessions alongside genuine examples where things don't work at the moment. At the same time, they may find it harder to see the bigger picture outside of their immediate job role. Other individuals may be beneficial to attend including marketing teams, sales and account management, support functions such as IT and Finance or digital and strategy teams.

Refine and share

Circulate your map to help begin informing decision making. Present it in meetings and encourage test and challenge, making sure to keep it live and iterated. Consider packaging it with other insights and recommendations and use it as a tool to focus and accelerate momentum into the next phase of your customer experience programme.

Future User Maps

Don't think that you've done all the hard work when your map is complete. It's important to realise that user personas don't stand still – they may have future needs which you will need to consider and anticipate. Future User Maps encourage you to extend your user persona backwards (say ten years ago) and extrapolate them forwards. As you do so highlight how their views, behaviours and choices have changed over time. Draw forward to your future user persona and consider generational aspects that may change or inform the user's beliefs and behaviour.

You may also consider developing a customer journey map that is based on how a user persona would experience the 'ideal state' of your service delivery. This sort of future state map would help to reinvent and conceive how a user or experience would feel in the future and articulate the benchmark or goals for your transformation.

Play Three: Create and Shape

Customer journey maps will help to demonstrate pain points and delight factors and may start to identify opportunities and actions. But these will need to be prioritised and converted into plans for implementable prototypes. If you are conducting a comprehensive customer experience, customer understanding and journey mapping exercise you will also have assembled a range of touchpoints and delight factors across a number of personas. You will need to shape these into meaningful programmes of work and a compelling future state. Here are some aspects that will be important as you shape your next steps:

Identify and prioritise the pain points

Consider carefully how you deliver against each of the identified customer journey pain points and the items you have identified as 'moments that matter'. Ensure you think about your most valuable customers and their expectations.

Identify opportunities

In order to streamline and improve the experience, consider areas of hand off and disconnection between touchpoints, or areas of waste across the journey map (whether through delay, duplication, errors and defects and so on. Look for gaps and differentiators along the customer journey against items that might be missed by your competitors.

Keep adding detail. As you walk in your customers' shoes be critical and honest. Consider adding more detail (whether through additional research or via engaging your front-line staff to evidence real examples) to uncover your customers' true functional and emotional needs. The more you can step outside your team perspective the more that your customers' challenges with their experience will become obvious.

Consider other dimensions

Evaluate other organisational aspects that may impact the customer experience (whether directly or indirectly). This might include your people and their capabilities; your systems; your market propositions; your brand positioning; your operational processes. Where you evidence areas that are performing properly call them out to help flesh out understanding of issues and resulting opportunities.

Don't forget the need to implement

Designing an effective customer experience is one thing; implementing it is quite another.You shouldn't avoid considering the implications of your customer experience design for your people, processes and products and their alignment. Your HR, Finance and Operations teams may need to be part of the design process as it will often be their teams who will be helping to make your transformation happen.

Be objective not subjective

While ranking ideas it's important that every idea gets rated on a well-defined set of parameters rather than being chosen or dropped subjectively. There are a whole host of methods for ranking but make sure you choose and apply ones that are effective for your desired workshop objectives.

Generate and refine your opportunities

Generating good customer experience improvement ideas will typically be done through facilitated individual and group ideation and subsequent shortlisting ideas through internal pitches and ratings. To do this successfully you will need to follow up your customer journey mapping sessions with a follow on session (s) used to ideate as a group and flesh out concepts.

The template on the right hand side can be used during the session to start to flesh out a card on each idea. This would be the output of a previous group process to generate, review and shortlist a range of improvement opportunities. The Idea template would be written for each of the most critical or easiest to implement concepts.

It may also be necessary to use solution cards to provide an initial, broad set of options to kick off the ideation process. Each card would have the description of a solution on one side, and a set of ideas and questions on the other side to help facilitate the discussion. These would likely be based on items that have arisen from your previous customer journey mapping workshops.

Once the idea templates have been produced the group should look to choose the most relevant ideas, interesting or feasible ideas through voting or consensus discussion. Ratings should also be used (such as value or business benefits versus ease of implementation).

Ideation works well when we accept a diversity of individual styles and give people the time they need to develop ideas individually. Individual brainstorming using the Idea Card can provide a start point to encourage multiple ideas from your workshop delegates. As delegates share their ideas back to the group, other individuals with similar ideas can be encouraged to collaborate to help flesh out and improve on the concept. After a period of time delegate groups can be swapped around and given a different stimulus question for the next round of ideation.

Establishing a customer experience transformation programme

Whilst customer experience transformation may be part of continuous improvement it is likely that it has come about through the strategic direction of the organisation, probably sponsored by senior management. This might be as a result of poor previous customer performance and fines, or as a bid for greater digital centricity, innovation and differentiation from competitors.

A customer experience programme will typically involve:

- **A vision statement**– why is change important and what customer experience vision and principles are being targeted?
- **A defined method**– How will customer experience ideas, propositions, prototypes and fully scaled ideas be developed? How will decisions be made between initiatives?
- **A well governed programme**– How will the programme itself be governed? What resources are needed and what will be the internal costs to the business?
- **What measured and KPIs will be used**– What mechanisms will be used to evidence and share progress?
- **Change and transformation**– How will people and organisational change be managed and controlled? How will it be sustained and implemented?
- **Roadmapping**– What is the roadmap of opportunities across all workstreams and how and when will they deliver the target customer experience vision?
- **Sequencing**– How will the whole of the business be engaged? Area by area or cross business? How will ideas be scaled up?

Ultimately a customer experience programme is a 'living' thing. It's either developing and growing, productive or in decline. Momentum is fundamental to the programme and realising the desired change. If your programme is struggling, consider the need for:

1. **Ownership** – You will need a single person in your business who is ultimately responsible for the success and quality of the customer experience programme. This should be someone senior enough to act as a Sponsor and with a vested interest in championing the outputs

2. **Resources** – You will need people on the ground who can do the legwork your programme will require. This might involve analysts and researchers to gather and make sense of customer research; facilitators who can guide the overall approach; subject matter experts in aspects such as mobile application design and integration; transformation and change agents who understand how to motivate and support your people. This doesn't all need to be in place from day one of course but make sure you have the right experts to guide you.

3. **A clearly defined scope** – Don't try to solve the world with your customer experience programme. Keep your initiatives aligned to the vision and budget and resist your business trying to constantly reshape or add to them, impacting your ability to deliver anything. It's far better to deliver a 'minimum viable' solution and then grow it from there rather than spend a long time trying to get something complex delivered.

4. **A consistent and ongoing approach** – We've seen all too many examples of customer experience programmes being touted by an executive team as the 'next big thing' only for them to flounder when that support is withdrawn or when the business leadership team focuses on something else. You might need to use a transformation programme to gain momentum but work to embed customer experience in your organisational DNA so that it is an integral and enduring part of how you do business. Customer needs will constantly evolve and your response to them will need to also.

Play Four: Soft Launch / Prototype

Prototyping is an approach to developing, testing, and improving ideas at an early stage before large-scale resources are committed to full implementation.

Prototyping allows you to try out your ideas without the pressure of getting everything right straight away.

It is an iterative process that enables you to involve a wide range of stakeholders in the testing process, to better understand how your customer experience improvement ideas will work.

Your high potential ideas will need to be tested with actual customers through low and medium fidelity prototypes. You will need to understand how customers respond to the proposed customer experience changes and pivot your approach according to the result and desired outcomes.

Prototyping methods

There are many ways to prototype and of course different hybrids of different methods! Prototypes help you literally see what you are doing, often physically, in a way that helps to explore complex interactions and relationships underpinning your customer experience solution. A prototype can help to generate reactions and questions from others and be a cost effective way to pre-test your ideas before they become too formalised or resource intensive.

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Here are some examples that we like to use on customer experience programmes:

Wireframe prototyping

A wireframe is a narrative prototype, usually created in the beginning of the design process. This prototype shows high-level sketches, visualising conceptual assumptions about the product structure and general interaction.

A wireframe is usually a low fidelity layout of the design used in order to present the main information, draw the outline of the structure and layout and provide a vision and description of the user interface.

Sketching

Sketching can be done as a group activity during a workshop session, to mock up ideas as they develop or to help convey a user interface or customer experience in its entirety.

They can be visually compelling ways of communicating a customer experience vision, for example the image on the left was created by Airbnb to represent one of the steps in its booking process. In this example professional animators from Pixar were used to develop the images across the end to end customer experience.

Storyboard prototyping

A storyboard is a narrative prototype (often building on sketching), usually created in the early stages to describe business requirements in the form of a scenario or story. These stories narrate user actions required to perform tasks specified.
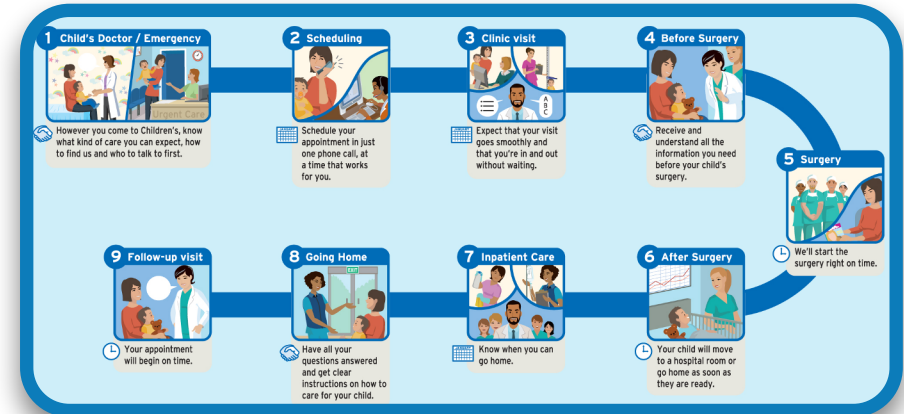
Paper prototyping

A paper prototype is a prototype that consists of a paper mock-up of the user interface. Paper prototypes allow you to test a design with many different stakeholders, including end users.

Blank model prototyping

Blank models are low-fidelity prototypes produced quickly using readily available materials to represent the user's notions about what an intended design could be like. This method is used in the early stages of design.

Digital prototyping

A digital prototype is an interactive prototype that consists of a digital mock-up of the user interface. The interface is usually partially functional, even if the functionality is implemented by methods of mocking up actual interaction. Digital prototypes allow you to test a design with many different stakeholders, including end users.

Wizard of Oz prototyping

Enables unimplemented technology to be evaluated by using a human to simulate the response of a system. The "wizard" sits in a back room, observes the user's actions, and simulates the system's responses in real-time.Often users are unaware (until after the experiment) that the system was not real.

Prototyping Tips

Not every organisation likes prototypes

In your company they may be called proof of concepts, mock-ups, feasibility studies, small scale models and so on. Adapt your language to be meaningful to your stakeholders.

Don't take all the limelight

It can be beneficial to see how your team explain and present a prototype in order to understand what someone else sees as important features.

Keep the design rough

If it looks like a finished product then users might find it harder to give feedback. Invite constructive feedback and help users feel like they have a voice.

Iterate your prototypes

It's not typically an activity to do once but will be refined and repeated building on learnings from the previous iteration

Listen at all times

If users and customers are giving you feedback, make sure you listen to it. Focus on their feedback and why they give it.

Understand why

Make sure you understand why you are creating the prototype, by clearly linking it to customer value drivers or pain points

Prototypes are not pilots

Pilots tend to be small-scale implementations of an entire process or service whereas prototypes tend to focus on testing specific components of services or processes with a small target group

Measure your outcomes

Prototyping needs evaluation metrics that are less stringent than those applied to your standard projects or pilots. Encourage appropriate risk and keep iterating across your prototyping road map.

Play Five: Measure Results and Improve

The impact of your prototypes will need measuring to assess whether the improvements add value and whether benefits are being achieved. Measurement will either lead to scale up, or the need for more research and iterations. You will need to be flexible to accommodate either and cycle back round the loop as needed.

Your customer experience prototypes should be evaluated in a way that helps you receive rapid feedback from users exposed to them and allow you to modify and continuously adapt to the results. In some cases the financial return on investment of the prototype (modelled through improved customer loyalty, purchase propensity and so on) may be beneficial.

Multiple measurement methods may be used depending on the prototype – from customer surveys, interviews, focus groups, analysis of customer data and KPIs or review during an interactive customer session. You should also consider the sample size and demographics to ensure that a suitable number of representative customers have been exposed to your prototypes.

Don't be afraid to stop your prototype. Not all assessment will reveal successful performance. Some of your customer experience prototypes might need to be rejected outright, others modified, and others scaled back or slowed down. Even a prototype that you terminate will provide important learnings to your development team and help in the shaping of the next prototype or improvement opportunity.

Share your successes

Use the results of your customer experience prototypes to spread success throughout your organisation, rather than isolating them within your department or project team. Sharing customer experience projects can be a spark for other improvement ideas and have a larger impact elsewhere in your company. Think about sharing process (what you did, how you did it), results (the quantitative and qualitative impact your prototype or project had), stories (vivid stories that reveal insights about your customers and their interactions), and learnings (positive and negative takeaways that may inform future practice).

Sharing such customer experience success stories can make the impact of your work come alive. Think about creating a one or two minute video to show the impact of your work. Sharing stories of people is a powerful way to leave an impression – particularly if it involves your customers participating in your prototype or interacting with an improved customer experience. You might want to include an interview with a customer who you worked with; a photo sequence or animation of the opportunity or video capture of a simulation or role play.

Keep focused on value

The end-game of your customer experience programme can often be compelling –more satisfied customers, increased loyalty, a lower cost to serve and more engaged employees. We find that organisations find it much harder to articulate what a superior customer experience is worth to them and exactly how it will generate value. Without a robust link to value, a business case that stacks up and ways to measure benefits, you may struggle to show early gains from your prototypes of improved customer experience and therefore struggle to build momentum.

Think about defining the customer behaviours that create most value for your business and then follow customer satisfaction over time to quantify the economic outcomes of different (improved) customer experiences. The value drivers will be different depending on your business, your industry and your customers, but chose the three or four that you think are most important and that you can measure. Review your historical customer data based on each of the outcome measures you have selected. Start to quantify how much less subject to churn satisfied customers are than dissatisfied ones. Break your customer data down by segment and consider tracking outcomes over time for each of these segments. It's also worth remembering that historical data alone can be misleading; you'll need to consider how your customers' behaviour, satisfaction and engagement may change in the future and model the scenarios that you anticipate are most likely.

Remember that whilst improvements to individual pain points or touch points may have demonstrable benefit, it's the overall and how satisfied your customers are across the end to end process. Also think about expanding your customer data set so that it links up with your operational data, as well as input from employees. This way you can measure the value of your prototypes and improvements holistically.

Play Six: Scale and Transform

Successful prototypes that have performed well will receive the green light to be scaled up. They will be grouped as a programme of transformation and their implementation managed as a change programme across your business, in order to sustain momentum.

Having successful customer experience prototypes is not enough. If they you don't scale up your opportunities tremendous value is lost to your organisation and of course your customers.

It's important to realise that your customer experience prototypes are designed to test hypotheses quickly and effectively. They often employ workarounds that may not be scalable or cost efficient when deployed more widely. Most successful prototypes will need to be re-purposed to become more robust, reliable, repeatable and with better alignment to current operational processes and systems.

Designing a road map

Your ability to deliver a road map of enduring customer experience improvements will depend on many factors – the way you have structured your programme, the benefits case, the sponsorship and engagement you have in place and the alignment of the programme with the priorities of your business. Don't be a victim of short term priorities to get 'quick wins' at the expense of more enduring change and transformation. Construct a road map that delivers short term rapid improvements but in the medium term is self-funding (and should be sustained) and in the longer term delivers against value drivers that are important to both your customers and your business.

Your customer experience road map will need to be well considered and balanced to ensure:

- The pace of change is acceptable to your business (whether phased roll out or big bang)
- The resource and capacity loads on your business are understood
- Quick wins are an immediate priority but more difficult mid-term opportunities are included and show that transformation is happening
- Your roadmap touches all of your customers (albeit sequenced in a way that makes sense for your business)
- Early improvements are used to fund more complex or time consuming improvements (those requiring IT investment or significant process change)
- You have change capability embedded in your programme team ready to help your business adopt desired ways of working in a structured manner
- You have considered other in-flight projects and programmes in your organisation, particularly those on which you will have a dependency

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Making change stick

This is worthy of a playbook in itself! We believe that an effective change management approach helps to identify and minimise issues, providing clear communication and faster speed to benefits for your organisation.

Change needs to consider the 'hard' and 'soft' – processes, systems, structure and people and personal change. All of these should be underpinned by insight – understanding the readiness, willingness of individuals and underlying root causes of behavior and ways of working. Delivering change through your customer experience programme should be no different – except that it can be even more complex as end to end experiences touch different functions, teams and systems across your organisation.

Our approach to change uses **Leadent's Business Change and Transformation Method**. This includes:

Scope, Vision and Strategy

Establishing readiness before embarking on your proposed customer experience change. This is achieved through a mixture of face to face group engagement, one to ones and / or using a structured Change Readiness Assessment. Think about developing a written case for change supported by a vision statement and goals for the customer experience opportunity that you are looking to scale up.

Plan and Build

Build a structured communications and engagement strategy with documented roles and responsibilities. Upfront change planning should evaluate which events, audiences and groups will be required to ensure that your desired change outcomes are successful.

Implement

You will likely require a significant engagement programme supported by change tracking to scale up your opportunities. Change should be 'brought to life' to demonstrate and coach the implementation. Change Champions are typically utilised to embody the change locally and they will be invaluable to model and support your customer experience transformation at a team and local level.

Realise

This phase will typically involve ongoing engagement and evidencing of working practice changing and the achievement of measurable outcomes. Ongoing benefits tracking and reporting will be used to demonstrate change is happening. Change awareness should continue through briefings, case studies, cross-team working and formalised training if required. Data from your customers will also be important to test your goals are being met.

Transition to Business as Usual

Depending on your change method a phased withdrawal of your customer experience programme team will usually be required as non-programme roles continue to operate new ways of working. A review of lessons learned is good practice and may inform other opportunities in your customer experience transformation road map. Ongoing ownership of benefits tracking should also be in place before your particular project closes formally and your team moves onto the next opportunity.

Business Change and Transformation Method

1) Scope, Vision and Strategy

2) Plan and Build

3) Implement

4) Realise

5) Transition

Ongoing plan for sustained results and BaU transition

Approach and plan aligned to business needs

Powerful Case for Change and readiness analysis

Tracking success with mgmt. support and waymarking

Fully mobilised against target performance and benefits

Measure

Leadent — potential made real

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Building customer experience capability

Whilst a customer experience programme built around specific improvement ideas and prototypes will deliver value to your customers, it is worth considering how a pervasive customer focus can become embedded in your organisational culture. This might include your strategy, structure, systems, capabilities and business processes.

There are many models of the dimensions that constitute the culture of an organisation. Here are some things to consider:

Formulate a clear strategic vision

You should develop a clear vision of your organisation's strategy, shared values and behaviours when shaped by customer experience. This will be used to communicate the intention and direction for change in your organisation.

Maintain a compelling case

Keep your customer experience transformation focused on value and a compelling case for change. Make sure that enough time is available to support the change and that management expectations of results and outcomes are realistic.

Role model management commitment

Your customer experience change must be managed and modelled from the top of your organisation. Willingness of senior staff to change demonstrates its importance. In order to show that the management team is in favour of the change, the change should be notable at this level first. At the same time don't solely focus on your senior management. Get the balance right between top-down focus and bottom-up initiatives run by your employees.

Modify your organisation to make the change a reality

You will need to demonstrate systems, policies, procedures and business rules that may need to be changed in order to align with the new values and desired customer-centric culture. Send a clear message to employees that the old system and culture are in the past.

Incentivise customer focus

Encourage employee motivation and loyalty to your target customer culture. Help your organisation to articulate the value (to the business and to your customers) of the changes and support buy-in to the change process. Training might need to be provided to employees to clarify new processes, expectations, systems and ways of working. Improving the lives of customers should matter personally to your employees.

Encourage collaboration– Customer experience initiatives don't work in silos. Keep encouraging teams to reach out across functional and role boundaries to make improvements happen. Don't be afraid to challenge the status quo (within acceptable business risk and governance) and think of ways to enable sharing of ideas and information. This might include collaboration tools and social channels, physical customer experience rooms, management 'back to floor' sessions, representative gestures (Amazon's empty seat at meetings representing the customer is a well known example), rapid prototyping and hackathon sessions and so on.

Deliver something usable– You will need to deliver outputs that are meaningful and resonate with the teams who will be receiving and adopting the new ways of working. Consider the best way to get your story across and the media to use to do so.

Bringing It All Together: What Next?

The complexity of dealing with customers and channels is ever increasing. Understanding your customers and consistently meeting their needs has never been more critical or challenging to your organisation.
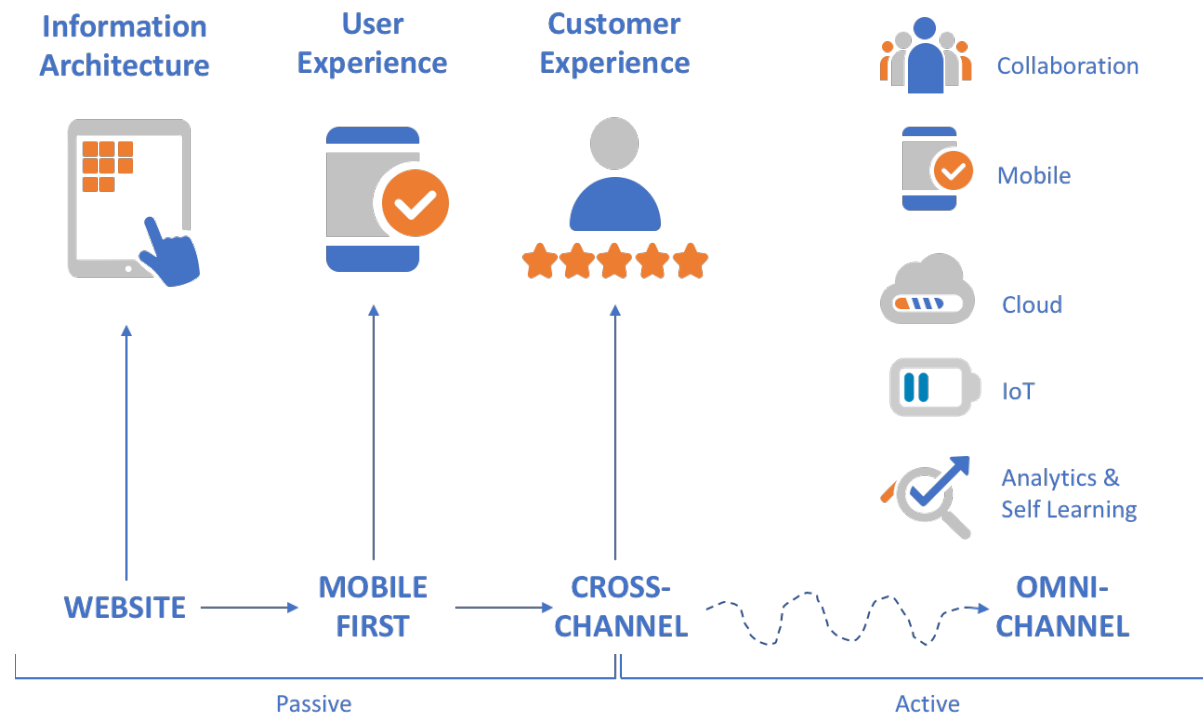
Over the past few years we have seen customers (and organisations) move from website and mobile-driven user experiences to consistent cross-channel customer experiences. You may also have systems that support you and allow you to measure and quantify your customer experience.

Even if you are at this point you can't be complacent. The future of customer experience is truly omni-channel and these channels are more diverse than you may realise. They include the ways in which customers collaborate with your organisation – including social media and mobile applications, but potentially also chatbots and intelligent assistants. Many of your applications will now be cloud-based. Customers may also be accessing your organisation through new routes such as smart devices or Internet of Things sensors. Analytics and machine learning can bring even greater intelligence to your datasets.

You should consider what really matters to your customers and evaluate the drivers of customer satisfaction and behaviour. You should review customer experience as an end to end and evaluate the range of touch points across your channels. You should also understand how your customer experiences compare to your competitors and which points of difference you can leverage. Where there are opportunities to improve, you will need to understand how to articulate these improvements and develop a structured approach to do so.

Customer experience design is both art and science and part art. It needs a solid platform of data and understanding but also flexibility, rigour and creativity. We've given you a range of tools in this Playbook to get you started but your approach will need detailed consideration and a structured method to be successful.

Customer Experience Healthcheck

Depending on your experience of delivering customer experience transformation and the progress you have made with an internally delivered programmes, an externally delivered healthcheck can be invaluable. The outset of a transformation programme is a good time for this in order to set your programme up right, support customer research and data analysis, build consensus amongst your senior stakeholders and learn from good practice of other organisations and their approaches. You may also need help to build a team and develop their capabilities or facilitate your initial workshop sessions. Business cases may also need support to develop in the right way and articulate a compelling storyboard with real benefits.

The typical duration of a Customer Experience Healthcheck will vary depending on its scope and complexity. Typically 8 to 12 weeks allows sufficient analysis and support. Broader types of engagement and to manage and develop a comprehensive customer experience programme will require more financial and resource effort. The rewards will speak for themselves.

Take Stock of Existing Programmes

Times of change in your business may demand a review of your customer experience approach. You may acquire a new business and need to reposition your customer experience across new operational processes. You may be looking to develop a new market or customer segment and require a detailed opportunity analysis. You may need to respond to a competitive or market threat or changing customer preferences.
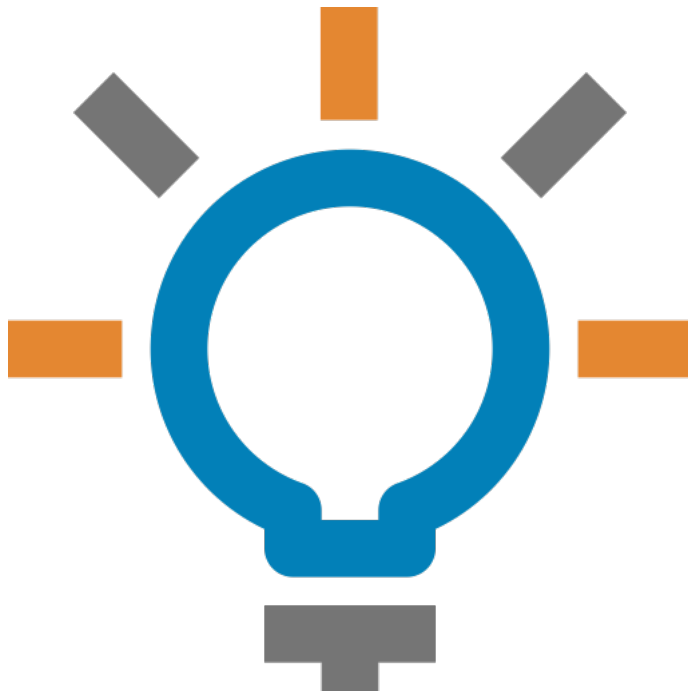
Injecting New Momentum

You may find that your customer experience or resulting change programme has lost momentum due to shift in senior expectations or sponsorship. Change and transformation needs momentum and a sense of urgency to be successful. Make sure you step back and source new ideas to move forwards. A structured change method is vital to making your customer experience prototypes and opportunities stick. A Healthcheck can also help you understand the extent to which your senior leadership have a shared view of current performance and aligned towards improving customer experience.

Benchmarking Performance

External support can be useful to shine a spotlight on your customers and to objectively evidence their points of view, needs and pain points. Some organisations find it hard to assess their own customer experience, particularly in the context of 'what good looks like' and how aspirational and visionary they should be with their approach.

Building a Customer Experience Culture

This will take time, dedication and focus to make happen. There may be areas of capability that you need support to identify, develop, coach or train in your customer experience programme team or those who work with it. Whether analysts, researchers, change managers, designers, prototypers; all of these are capabilities you will need to identify, grow and propagate.

How Can Leadent Help?

Leadent helps organisations that manage a large, complex, dispersed workforce to achieve transformational change; encompassing people, process and technology.

We work across all areas of customer experience – from setting up programmes, facilitating research and workshops, analysing customer data to delivering and scaling up prototypes and complex programmes of change and transformation right across your business.

We can help you to be as efficient and effective as you can be with your customer experience programme, regardless of your experience and maturity.

We leverage our experience of working with some of the UK's largest water, energy, telecoms, facilities and public service organisations to demonstrate how best to transform your business.

Get in touch with us to discuss further.

Leadent
potential made real

Further Reading

There is a whole host of reading material on customer experience and even more on innovation. Here are some places to start:

- Adaptive Path (2013): Guide to Experience Mapping;
- Carleton, Tamara; Cockayne, William; Tahvanainen, Antti-Jussi (2013): Playbook for Strategic Foresight and Innovation
- Burns, Megan (2016):The Customer Experience Management Maturity Model (Forrester)
- Coleman, Ben (2017): Designing UX - Prototyping
- Drucker, Peter (1998): The Discipline of Innovation; Harvard Business Review November to December pp 3 – 8
- Drucker, Peter (2007): Innovation and Entrepreneurship (Classic Drucker Collection)
- Kimbell, Lucy (2015): The Service Innovation Handbook: Action-oriented Creative Thinking Toolkit for Service Organizations
- Laufer, Deanna (2015): Customer Experience Strategy Best Practices (Forrester)
- Oracle (Various): Designing CX
- Osterwalder, Alexander (2014): Value Proposition Design: How to Create Products and Services Customers Want (Strategyzer)
- Rawson, Alex; Duncan, Ewan; Jones, Conor (2013): The Truth About Customer
- Experience; Harvard Business Review
- Smith, Ryan; Williams, Luke (2016): The Most Common Reasons
- Customer Experience Programs Fail; Harvard Business Review
- Various (Business For Social Responsibility): The Healthy Business Innovation Playbook
- Various (IDEO): Design Kit: The Human-Centered Design Toolkit
- Various (2016): Customer Experience: Creating Value through Transforming Customer Journeys (McKinsey)
- Zaki Warfel, Todd (2009): Prototyping: A Practitioner's Guide

Leadent Thinking

We have written a range of material with our thinking on customer experience and why it is important to operations businesses. Some of our recent insights can be found at:

- *Cutting The Cost of Poor Service In Telecoms*
- *How do you connect with the connected customer?*
- *The True Cost of Customer Service in Utilities*
- *What Can Organisations Learn from Retail's 'Omni-Channel' Approach?*
- *Your Customers Don't Trust You Enough For IoT*
- *10 Tips to Kick-Start Your Change Programme*
- *'Customer Experience' - Just Cheap Buzz Words To Sell Software?*

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