

# Customer Experience Design: An McorpCX Best Practices Webinar

Learn to radically (and systematically) accelerate customer loyalty through CX design, and the frameworks and tools to help do so.

June 9, 2016

mcorpCX



# Your Presenter, Michael Hinshaw: President, McorpCX



- Teacher (and student) of customer experience design, innovation and digital strategy
- Mapping customer journeys and improving customer experiences since 1998
- CMO.com columnist and best-selling author: *Smart Customers, Stupid Companies: Why Only Intelligent Companies Will Thrive, and How To Be One of Them*
- Mentor and Teaching Fellow at UC Berkeley's Haas School of Business

# Engaging globally, across industries with leading brands

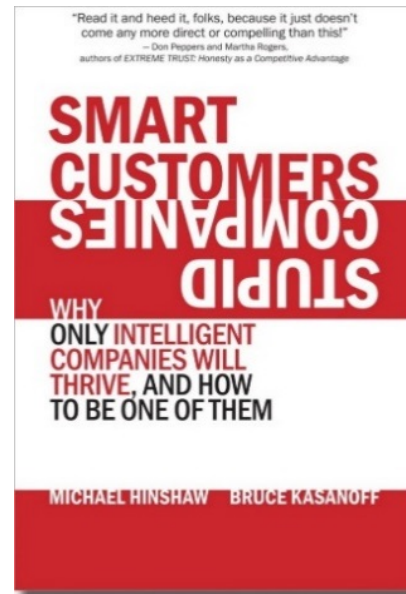


# Wide recognition as experience strategy and design leaders

Media recognition for our thought leadership



Best-selling book on digital and CX innovation



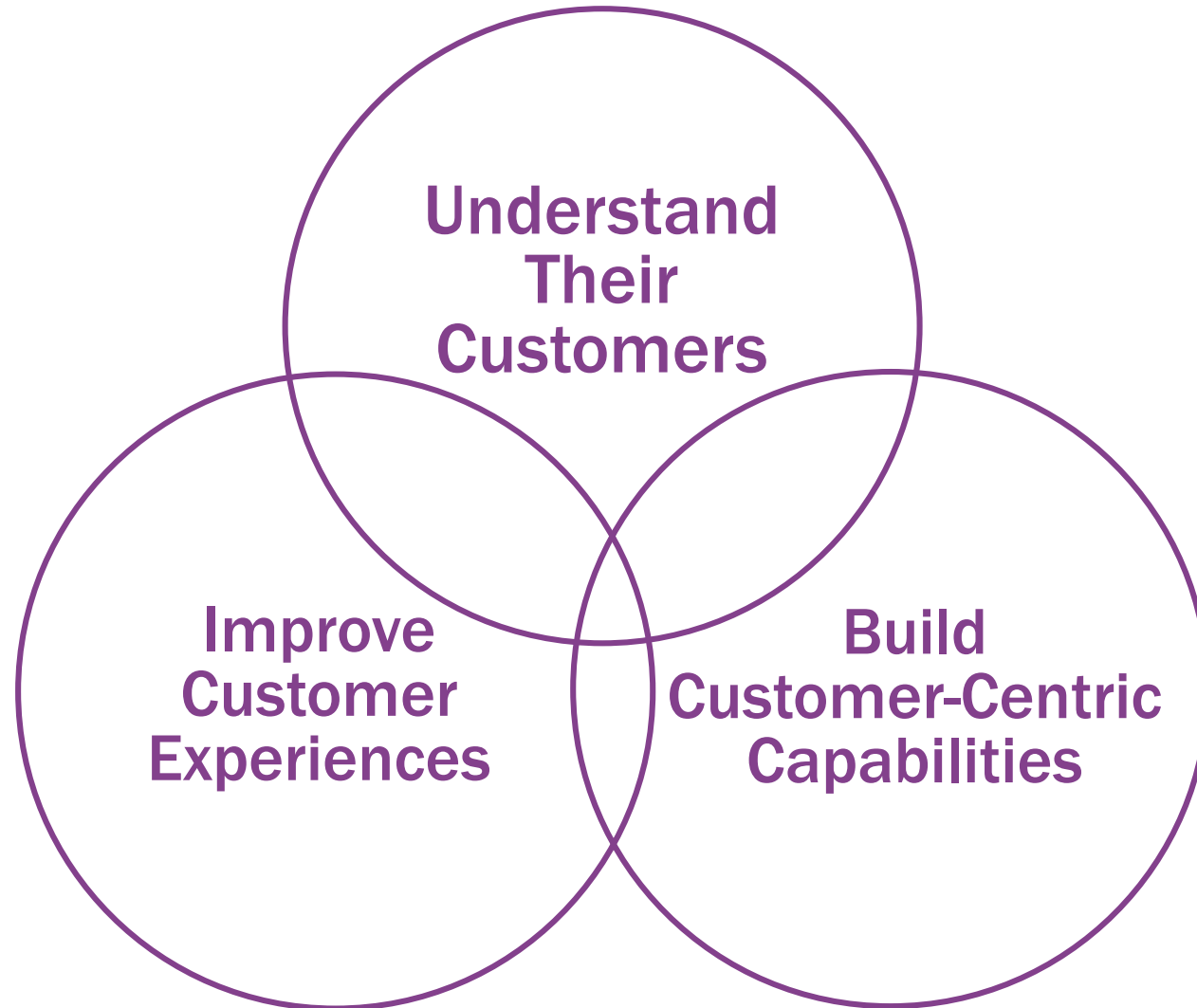
“One of the most exciting business books I’ve ever read.”

- Don Peppers  
Founder, Peppers & Rogers

Analyst Recognition as a global customer experience and digital strategy leader



# Helping the companies we work for do three things:



Today, we're going to discuss:  
What CX Design is (and why it matters), Experience design pitfalls to avoid, CX Design frameworks and tools, and How to enable CX design in your organization.

# In a world of radically changing customer expectations, there is only one sustainable competitive advantage:



Deliver a better customer (and employee, and partner) experience, across all channels and interactions



# Plus, customer experience drives significant value

CX leaders enjoy results like...



Up to 2.4 times annual revenue increase, per-customer<sup>1</sup>

Reduced cost to serve customers (For Sprint, 33%)<sup>1</sup>

More than double the growth of their competitors<sup>2</sup>



# But great customer experience doesn't "just happen."

A defined process  
for solving business  
problems



Integrating customer  
needs and business  
requirements



**It's designed.**

# Customer experience design is a core capability of best-in-class and a driver of CX Maturity

Developing better

Driven by your business and brand strategies

requires:

Customer Experience Strategy

Customer Understanding

Design and Innovation

And should be part of your culture...

customer experie

Informed by what customers want and need

A repeatable process for problem solving

Governance

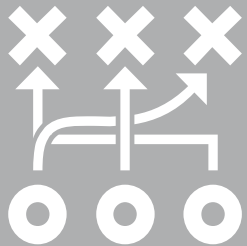
Culture

M

holders

# Why? Because experience design is smart business

It is the link  
between  
strategy and  
execution



It drives  
innovation  
and market  
differentiation



It creates  
emotional  
bonds  
with your  
customers



And is a  
source of  
competitive  
advantage



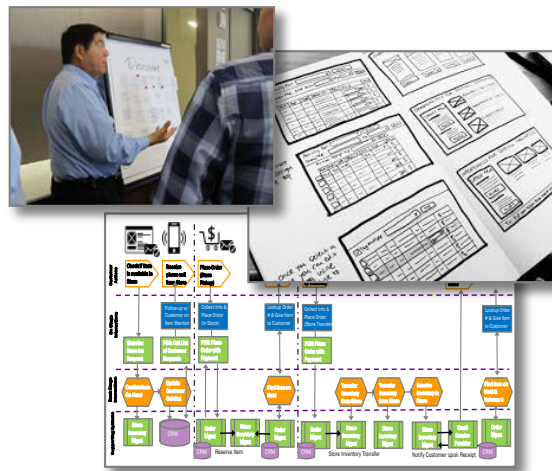
# As a business discipline, there's a structured approach...

## Outside-In Customer Understanding



Starts with Deeply Understanding Customer Wants and Needs

## CX Design and Experience Blueprinting



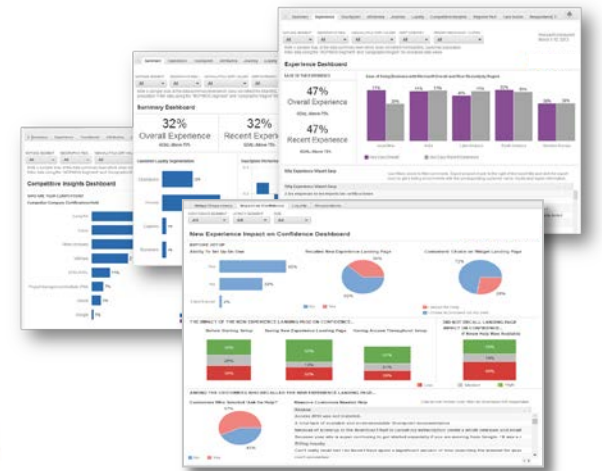
Unmet Needs Drive Design and Blueprinting Initiatives

## Prototype, Test and Iterate



Designs are Tested with Customers, Improved Based on Feedback

## Implement, Monitor and Improve



Sustained by Monitoring Results to Continually Improve Over Time

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# Delivering great customer experience requires “seeing” experience through their eyes, and doing so across...



# Common CX design issues occur when...

Decision making criteria is unclear

Experiences are not personalized based on customer needs

Companies don't "remember" their customers

The process is more complex than it needs to be

Expectations are not clearly set (or are set, but incorrectly)

Customer emotions or feelings aren't considered

**Bad CX designs are needlessly complex and erect barriers to achieving the customer's goals**

Designed Experience

Desired Experience





# They confuse customers when decision making criteria is unclear



## Chase Freedom UNLIMITED<sup>SM</sup>



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after you spend \$500 on purchases in your first 3 months from account opening

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- 0% intro APR for 15 months<sup>†</sup> & \$0 annual fee<sup>†</sup>

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balance transfer fee  
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(6877 reviews)

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[†Pricing & Terms »](#)

- 2X points on travel and dining
- \$0 intro annual fee, after that \$95<sup>†</sup>

They annoy when companies  
don't "remember" customers

What is your  
account  
number?



They undermine the relationship when customer emotions aren't taken into account

That  
"Oh \$#!@"  
Experience

B-19505  
R-171

# Question: What percentage of Fortune 1000 marketers depend on data for customer-related decisions?

**11%**

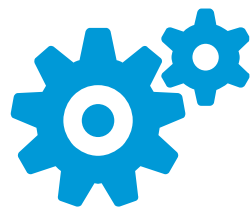


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# Four steps to great experience design

1.

Integrate  
CX with your  
business  
and brand  
strategies



2.

Listen to  
and deeply  
understand  
your  
customers



3.

Design  
solutions to  
meet customer  
wants and  
needs



4.

Prototype,  
test and  
iterate on  
those  
solutions



# Integrate CX with your business and brand strategies



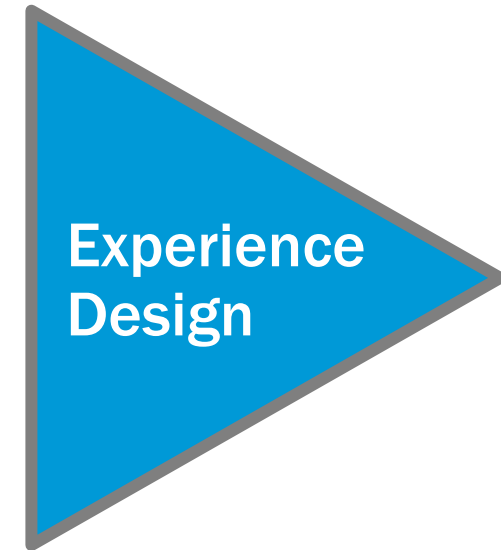
What are your strategies for business success?



What are customer expectations of your brand?

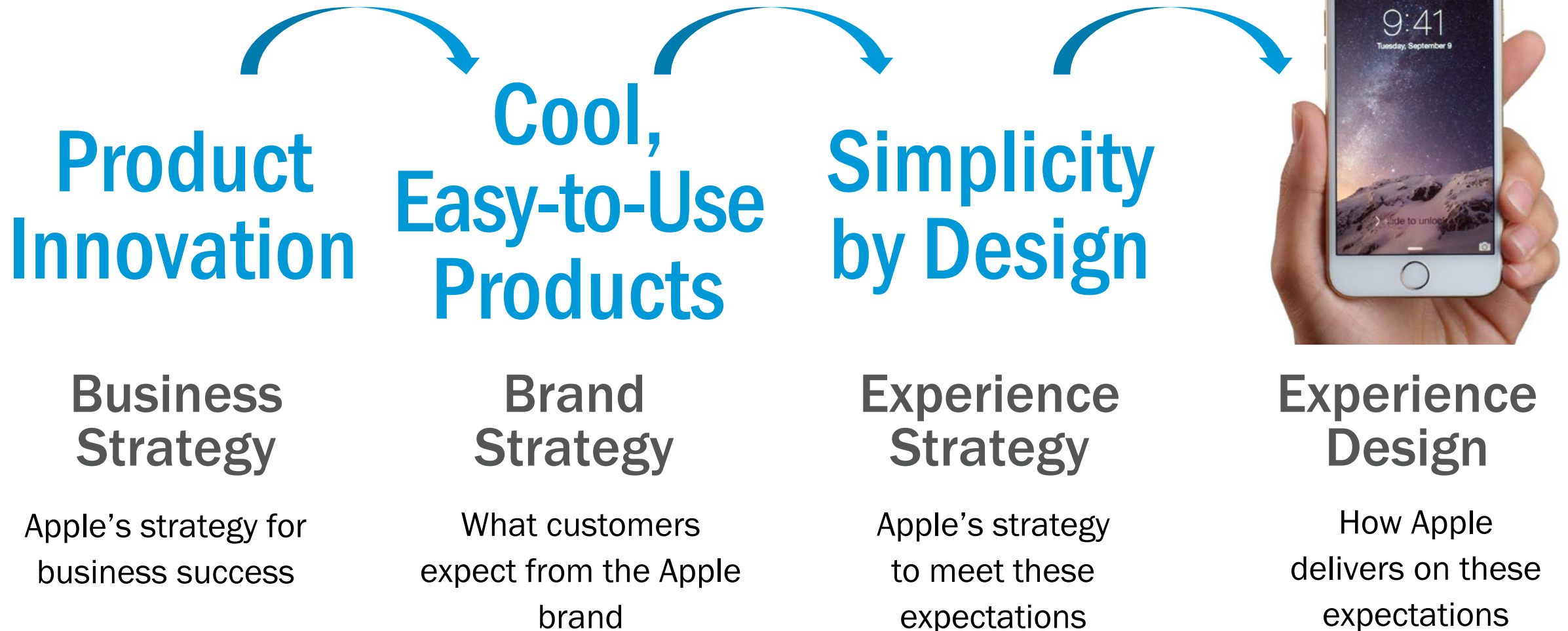


What are your plans for meeting customer expectations?



How will individual experiences best deliver on customer expectations?

# Integrated strategies in action: Apple





# Listen to and deeply understand your customers

Identify Segments + Journeys

Voice-of-the Business

Qualitative Customer Research

Quantitative Customer Research

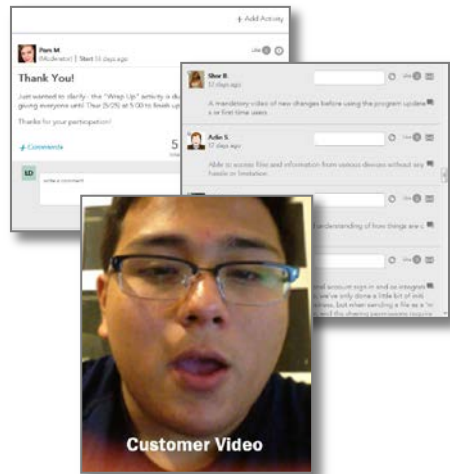
Data Analytics



Know whose experience we're trying to improve



Gather internal views of that experience



Gather open-ended customer perspectives



Quantify all aspects of the experience



Analyze data to identify gaps and opportunities

# And socialize with customer persona and journey maps

## “Caleb” “IT Manager”

Manages a small team of analysts and engineers that support the CX team and the CX leads across the LOBs



## Mary “CX Leader”

Oversees a small, dedicated CX team and coordinates CX efforts across departments



## “Sue” Marketing Exec

Manages a large marketing department with direct or indirect control over CX activities



## Luis “Market Research”

Manages a small team of market researchers and analysts who field requests from LOBs and other groups



“So many data sources, so little time (and too many different tools) to make sense of it all.” - Eva “CX Manager”

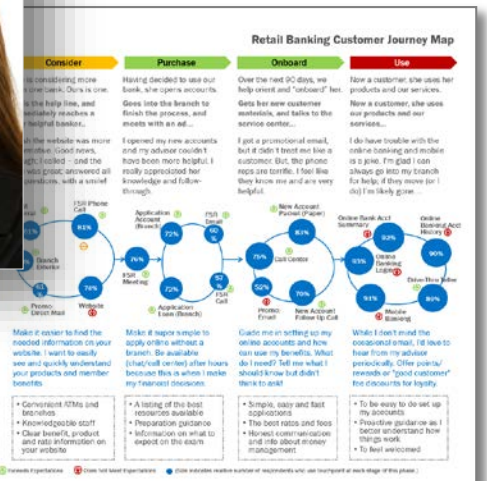
“A customer journey map vs. a 20-page research report or a bunch of spreadsheets? A journey map wins every time with executives and business partners.”

### About me:

- I'm 34 years old with a background in marketing, customer insights and project management at a growing tech firm
- I manage a small group of CX analysts working across departments to monitor customer listening posts and coordinate experience improvement initiatives.
- We help our firm to get and keep customers through better, more innovative customer and partner experiences than our competitors

### My goals:

- I want to quickly bring insights from different sources into “one view” of the customer experience to drive timely decisions - and deliver incremental improvements and innovation
- I'm looking for CX tools and vendors to automate the integration and analysis of disparate data sets.
- My team needs to get a better handle on analytics, and bring reliable insights into our journey maps and ongoing CX reports.



# Design solutions to meet customer wants and needs

Prioritize  
Improvement  
Opportunities

Filter  
Through CX  
strategy

Apply  
Design  
Frameworks

Touchpoints	Stage	Correlation	Gap	Kano
Branch Location	Transact	0.359	-1.0	Basic
Loyalty Program	Transact	0.551	-0.7	Performance
ATM	Transact	0.429	-0.6	Performance
Online Banking	Transact	0.420	-0.5	Performance
Phone Call/Call Center	Transact	0.473	-0.4	Performance
Mobile Banking	Transact	0.368	-0.3	Basic
Website	Discover	0.440	-1.3	Excitement
Online Search	Discover	0.379	-1.5	Secondary
Website	Consider	0.249	-0.3	Basic
Social Media	Discover	0.393	-1.1	Secondary

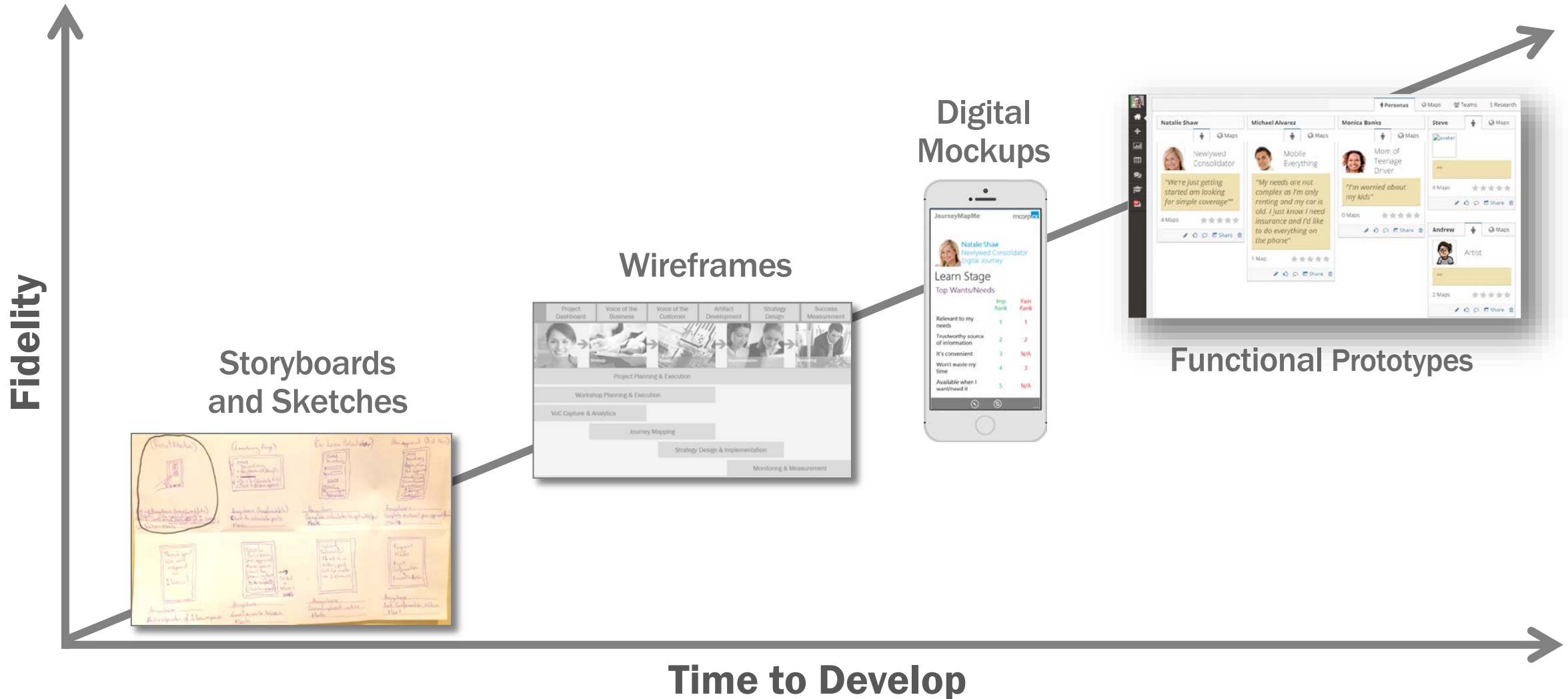
[Define the Problem]

## “Tailored Intimacy”

Business Strategy:  
The Discipline of  
Customer Intimacy

Experiences  
that are:  
Personalized,  
Empathetic,  
and Insightful

# Prototype design solutions, considering many options

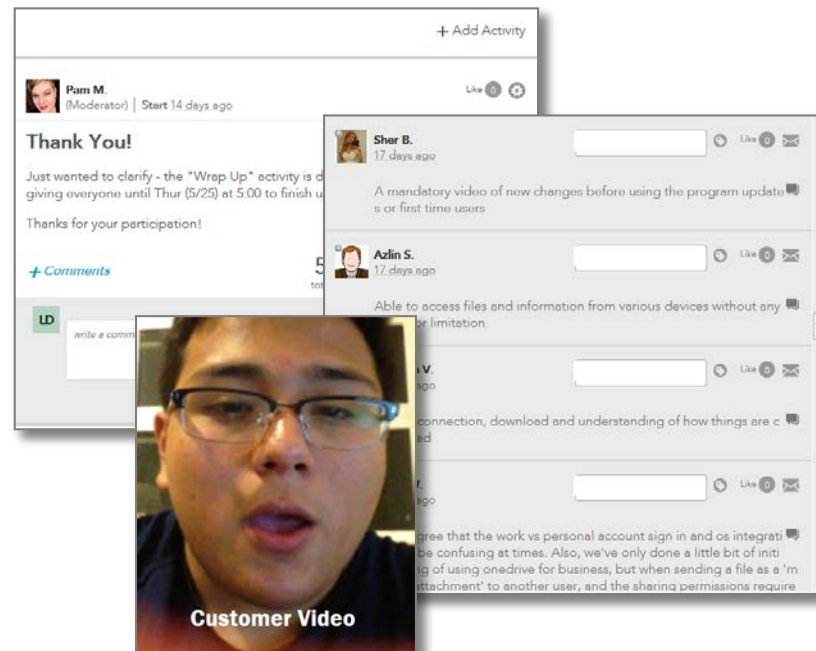


# Test and refine with customers, iterate on improvements

## Test (and Develop) In Person: Co-Creation



## Conduct Online Customer Research



## Measure Performance Against KPIs



[Repeat as Needed]

# This discipline helps move you from context to execution

Outside-In  
Customer  
Understanding

From  
context to  
design...

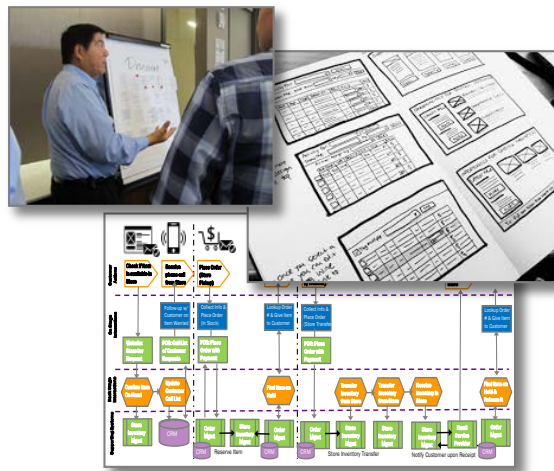
CX Design  
and Experience  
Blueprinting

And  
design to  
execution...

Prototype,  
Test and  
Iterate



**“Context”**  
Primary and  
Secondary Research  
and Analytics



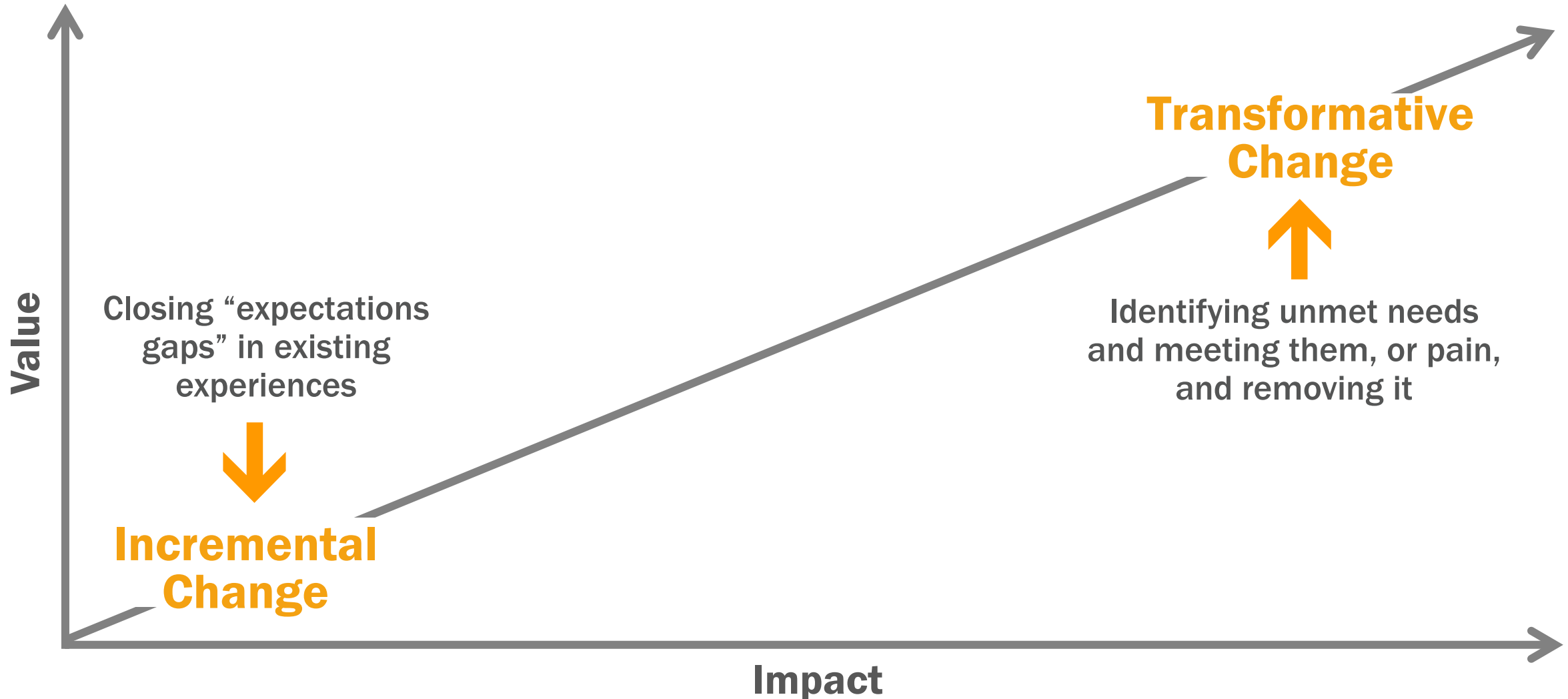
**“Design”**  
Hands-on Workshops,  
Wireframes, and  
Experience Blueprints



**“Execution”**  
Plan, Develop,  
Deliver, Iterate and  
Improve on Designs

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# Experience design (and innovation) can be little or big





# There are many things you can do: Start with these six

Develop a common understanding of customer journeys

Make customer understanding (VoC, analytics) a key input to design

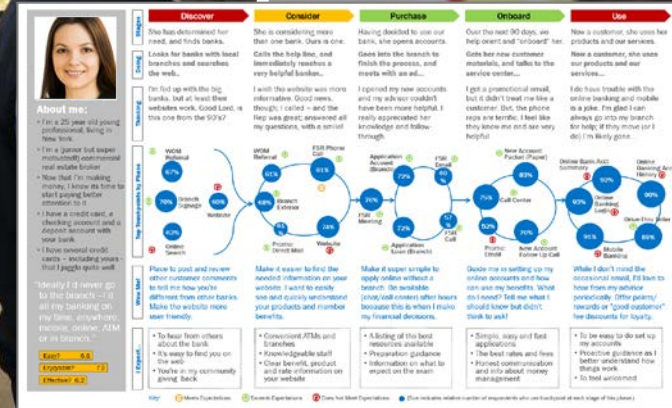
Use design to solve problems: “Baked In” not “Sprayed On”

Put your customers and their needs at the center of design

Learn to identify improvement opportunities, and prioritize them

Follow a defined process for the design of customer experiences

# Develop a common understanding of customer journeys



Start with Journey Mapping Workshops, and move on from there

# Make customer understanding a key input to design



# Use design as a tool to solve defined business problems

## Design Baked In:



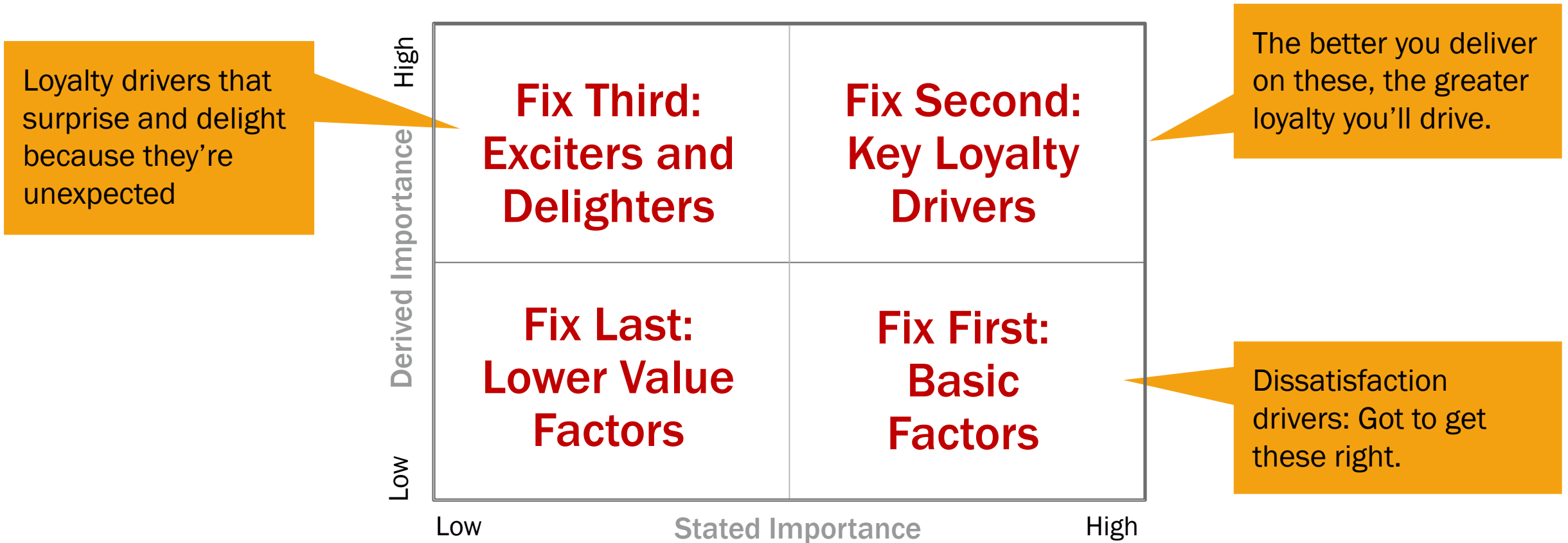
## Design Sprayed On:



# Put customers and their needs at the center of design



# Identify and prioritize improvement opportunities

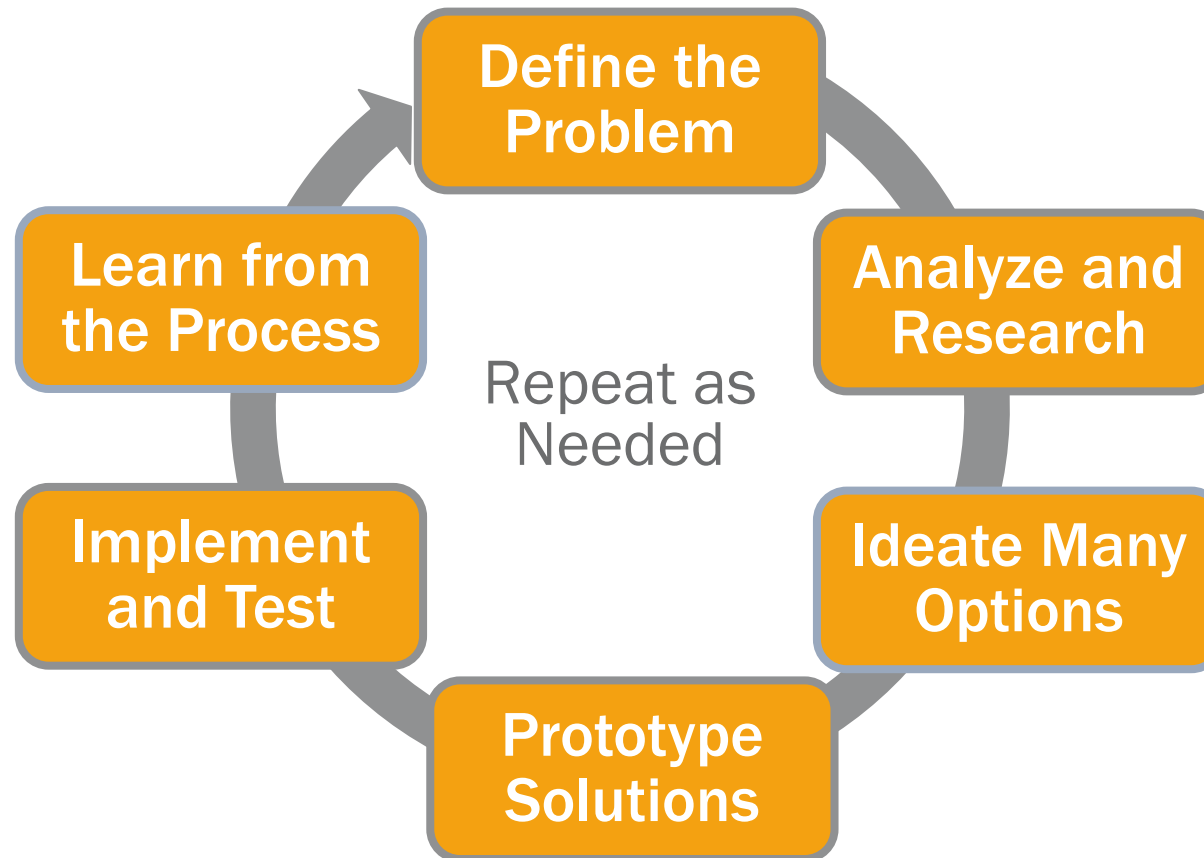


# Have a defined process: “Design thinking” can help

Design Thinking is:

Open  
Observant  
Future-Focused  
A Process

6 Major Steps of the Design Thinking Process



Design Thinking is Not:

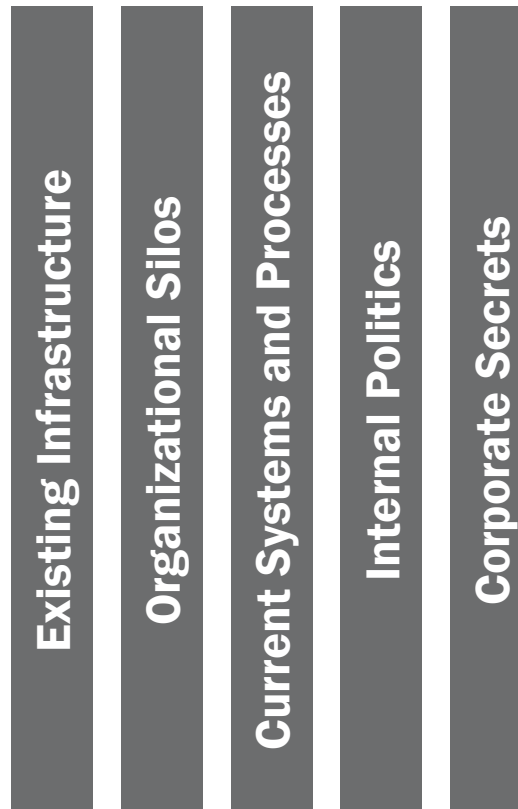
New  
A Secret  
Hard  
Complex  
Closed

# Bonus thought: Last but not least - think like a startup.

## Your Company



## Barriers to Future Success



## Your Customers





**In closing, a few takeaways...**

# Customer experience design - 5 key takeaways...

1. CX leaders have integrated business, brand and experience strategies, executed through CX design
2. Start by deeply understanding your customers
3. Use data to help prioritize and design solutions that meet customer wants and needs
4. Test and iterate, moving from lower-fidelity designs to functional prototypes to “live” solutions
5. Learn, practice and embed CX design processes to continuously deliver better experiences

Any questions? Let's talk...



# Free CX design review with Michael...



For webinar registrants only!

He'll discuss:

- Opportunities to improve your CX design process
- Practical steps to accelerate your design efforts
- Where to focus efforts to outshine competitors

Respond to our follow up email or contact Tim at (440) 285-1837  
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