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NETWORK WITH CONTACT CENTER PROFESSIONALS AT ICMI.COM

May 6-9, 2014 • San Diego



contact center expo & conference

Session Pre-3

Customer Experience Journey Mapping

Jim Tincher, Heart of the Customer

Hashtags: #ICMI #CX

REVOLUTIONIZE THE
CUSTOMER EXPERIENCE



OR

How to
show

everything
that really
matters

to your
company's
success

Using a
whole
bunch

Of Post-It
Notes®

Made in
Minnesota!

TODAY'S TOPICS

The
Importance
of
Customer
Experience

What is a
Journey
Map?

Leading a
Journey
Map
Workshop

Creating
Change
through Maps

WHO'S JIM?



Customer Experience Consultant, Blogger and Speaker

- Heart of the Customer Blog
- Keynote speaker, consultant and trainer on customer experience
- Ran customer experience programs at Best Buy and UnitedHealth Group
- Former Senior Consultant at Gallup

For today: Hashtags: #ICMI #CX



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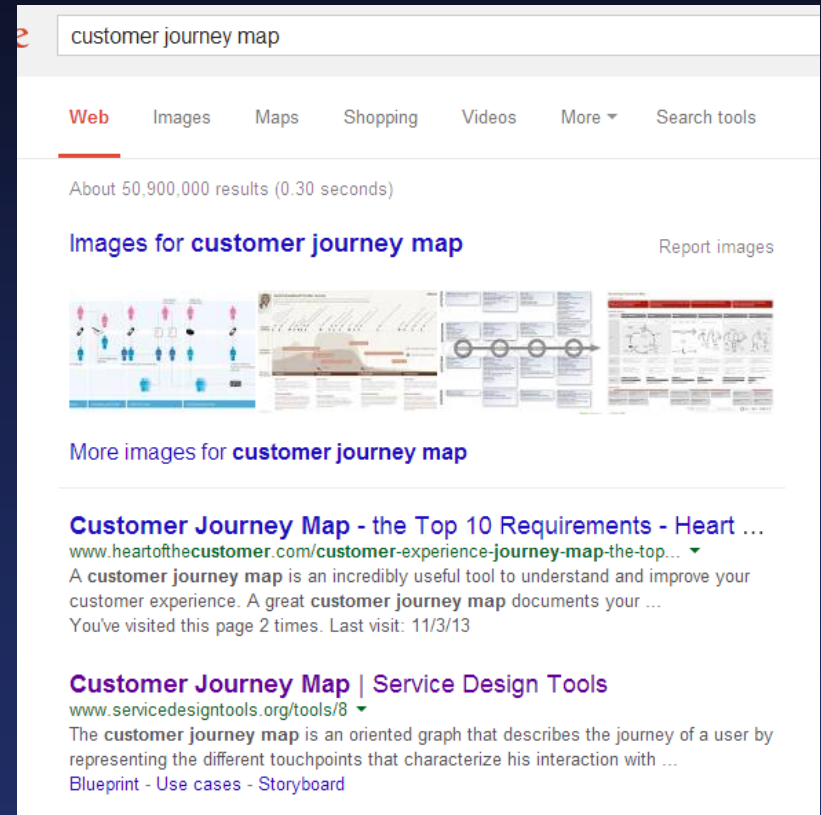
JOURNEY MAPPING BACKGROUND

Author: Top 10 Requirements for a Journey Map

- Viewed by over 30,000 customer service and customer experience professionals

Presenter at CXPA: *Best Practices for Creating a Customer-Focused Journey Map*

Frequent speaker on the topic



The image shows a screenshot of a Google search results page for the query "customer journey map". The search bar at the top contains the text "customer journey map". Below the search bar, there are tabs for "Web", "Images", "Maps", "Shopping", "Videos", "More", and "Search tools". The "Web" tab is selected. The search results show "About 50,900,000 results (0.30 seconds)". The first result is titled "Images for customer journey map" and includes a "Report images" link. Below this, there are four thumbnail images of various customer journey maps. The second result is titled "Customer Journey Map - the Top 10 Requirements - Heart ..." and includes the URL "www.heartofthecustomer.com/customer-experience-journey-map-the-top...". The description for this result states: "A customer journey map is an incredibly useful tool to understand and improve your customer experience. A great customer journey map documents your ... You've visited this page 2 times. Last visit: 11/3/13". The third result is titled "Customer Journey Map | Service Design Tools" and includes the URL "www.servicedesigntools.org/tools/8". The description for this result states: "The customer journey map is an oriented graph that describes the journey of a user by representing the different touchpoints that characterize his interaction with ... Blueprint - Use cases - Storyboard".



TODAY'S TOPICS

The
Importance
of Customer
Experience

What is
Journey
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Workshop

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Mapping

WHAT IS CUSTOMER EXPERIENCE?

The perception that customers have across all of their interactions with your organization.



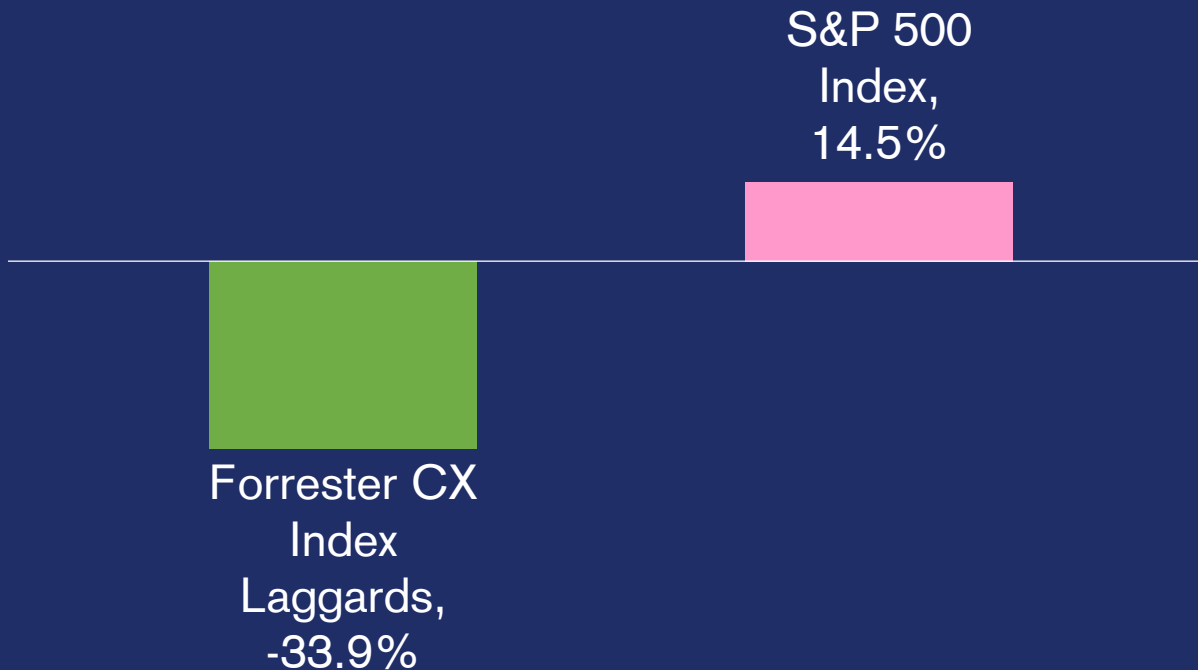
BUSINESS CASE FOR CUSTOMER EXPERIENCE

6-Year Stock Performance of CX Index Leaders vs. Laggards, 2007-2012



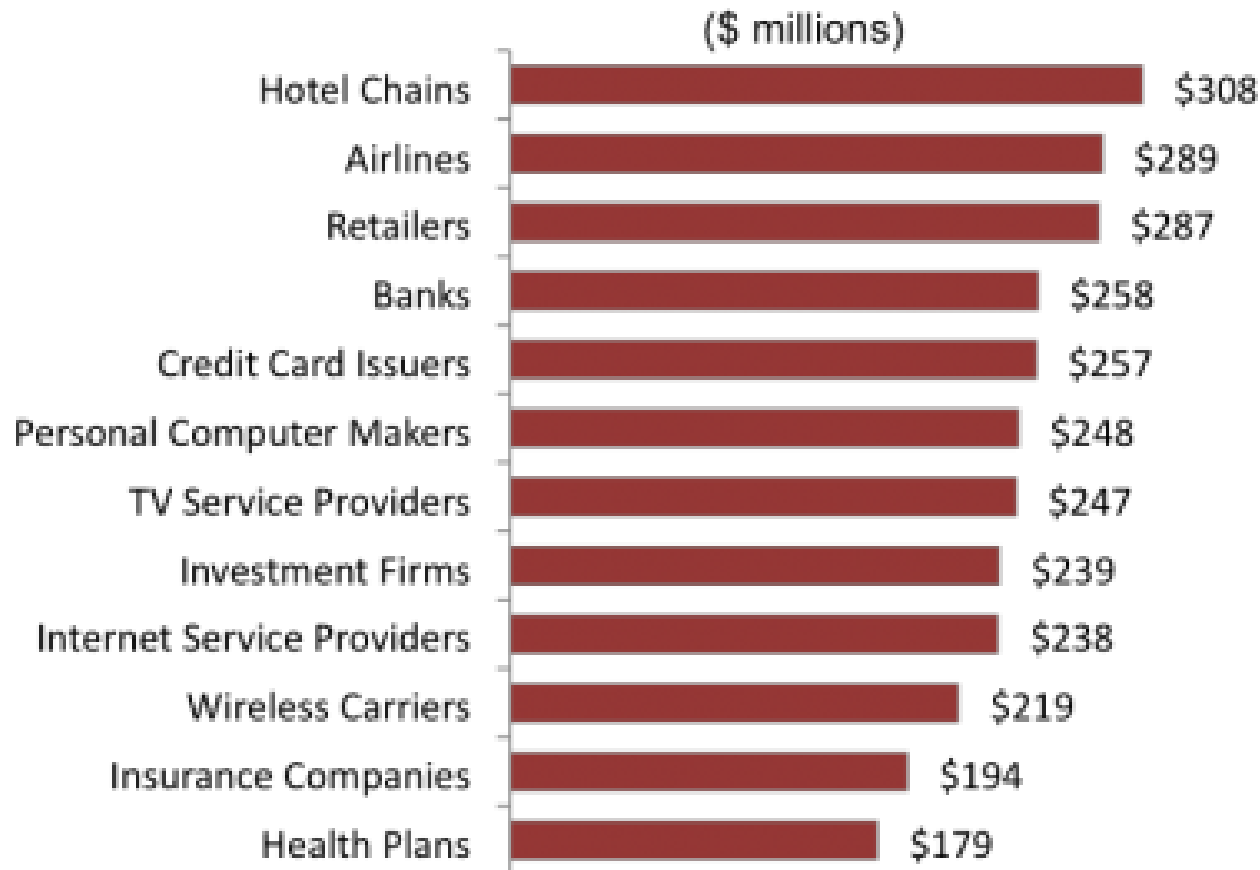
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Good Customer Experience Generates Revenues

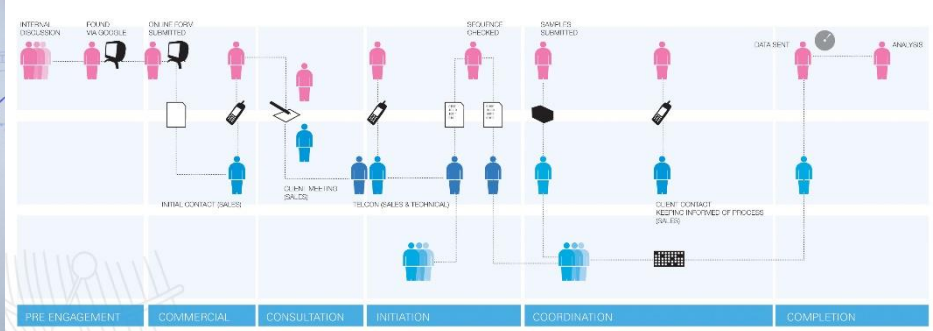
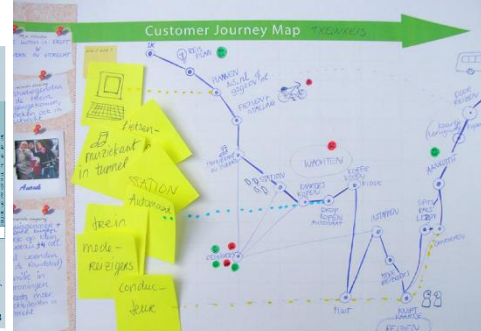
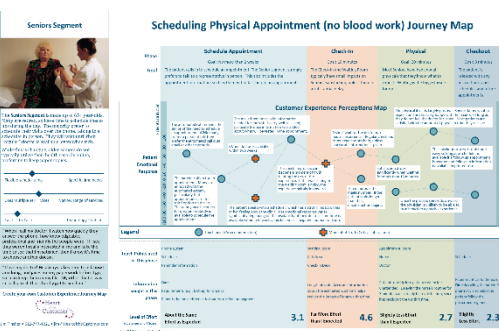
Additional revenue over three years from a modest improvement in customer experience (10 percentage points on Temkin Experience Ratings) for a company with \$1 billion in annual sales



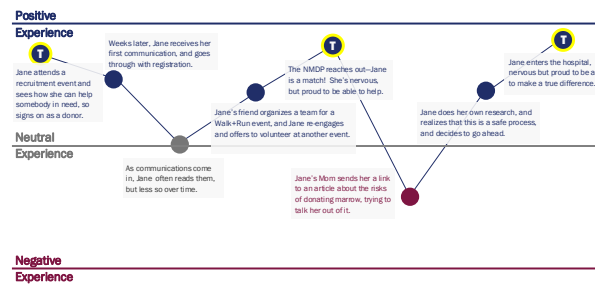
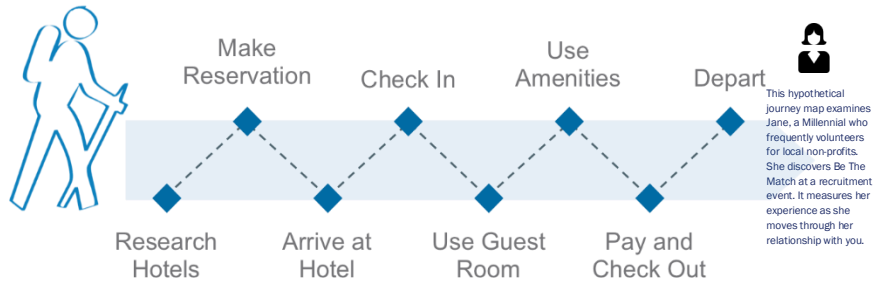
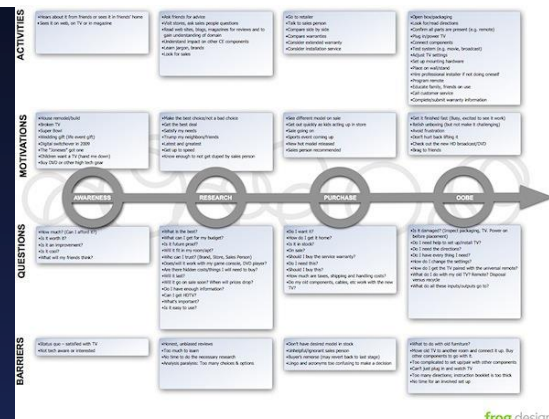
Source: Temkin Group research report *"The Customer Experience-Loyalty Connection"*

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What is a Journey Map?



YOU WORK FOR COOLSURE

Hot new health insurance company

Great product features, good pricing

But individual customers are not signing up like you expect

“Coolsure won our latest review of health plans in [your state]. Their plans are comprehensive, and their pricing is the best.”

– *Consumer Reports*



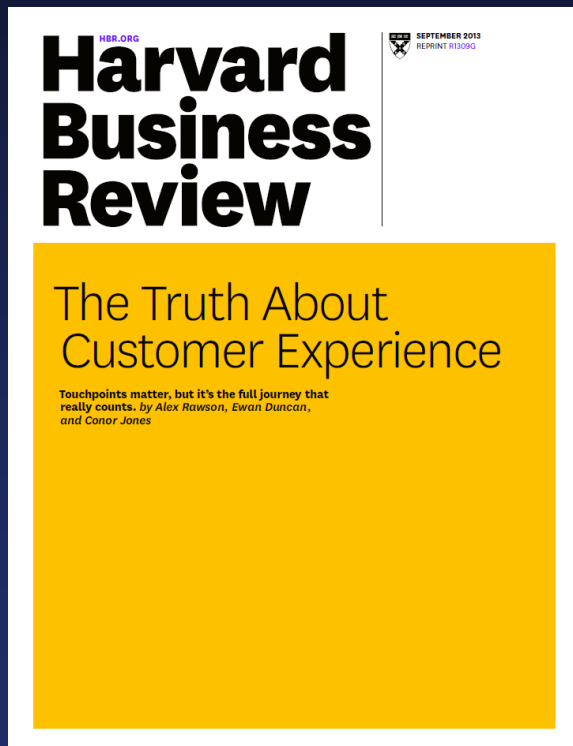
Your boss heard that journey mapping can help



You can't go home until you understand how

FIRST QUESTION: WHAT'S A JOURNEY?

A journey is your customer's end-to-end experience



Companies have long emphasized touch points... But the narrow focus on maximizing satisfaction at those moments can create a distorted picture, suggesting that customers are happier with the company than they actually are. It also diverts attention from the bigger—and more important—picture: the customer's end-to-end journey.

- The Truth about Customer Experience,
Harvard Business Review

JOURNEYS TYPICALLY INVOLVE MULTIPLE DEPARTMENTS AND TOUCH POINTS



Signing up for cable service



Refinancing a home



Signing up for a new cell phone service



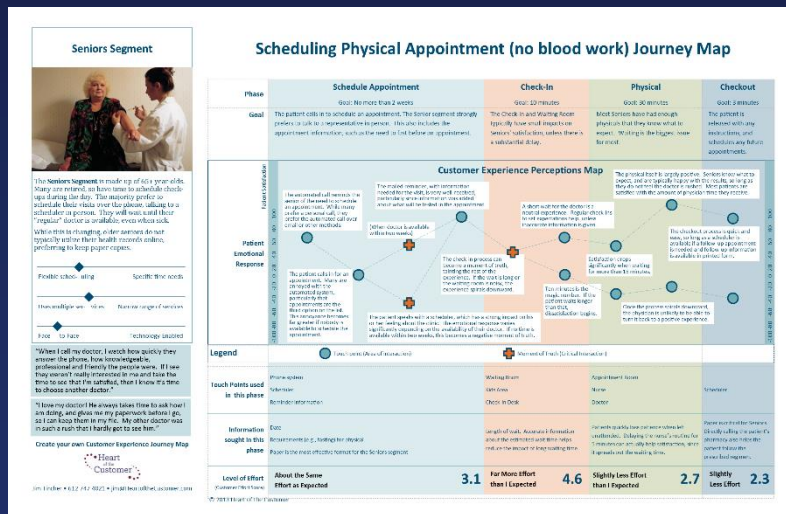
Buying a new dishwasher

SO, WHAT'S A JOURNEY MAP?

A journey map is typically one of two things:


Research to understand your customer experience

A workshop to document your customer experience



MOST ARE LINEAR, SOME ARE CIRCULAR

Meet Amanda



Amanda is a freelance graphic designer with two kids. Her husband Mike recently lost his job, and their health insurance is about to run out. Amanda needs to find a plan that will protect her kids and ease her mind. She's never shopped for health insurance before, and finds the thought of it overwhelming.

They don't have a lot of money but it's very important that she has the right healthcare for her kids, especially Jacob, who suffers from asthma.

Low Cost Plan Comprehensive Offering


Research Online Prefer Personal Contact

Quick Research Thorough Research

"We had a plan a few years ago that didn't cover Jacob's asthma. It was terrible that my insurance company didn't think it was important. Of course we paid for it. But I felt like having to make these kinds of choices about my kids' health."

"When I shop for auto insurance it's really easy. I put in my information and up pops three quotes. But choosing health insurance is a job-and-one I don't enjoy!"

Create your own Customer Experience Journey Map



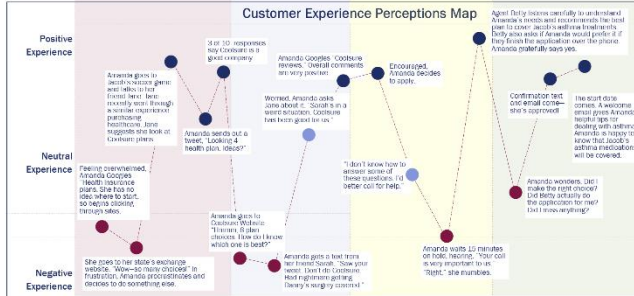
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Customer Experience Perceptions Map



Positive Experience

- Average gains in satisfaction scores from 1.5 to 2.5 in the initial week. Here recently won through a number of market partnerships.
- Encourages Amanda becomes to apply.
- Agree. Duty seems carefully to understand Amanda's needs and encourages the usual plan to cover. Amanda is willing to trade the higher price for the peace of mind that it provides if they find the application over the phone process preferable.

Neutral Experience

- Amanda needs a better level. Looking for a health plan, she says: "I don't know how to answer some of these questions. I'd better call for help."
- Amanda wonders, but not make the right choice? Do facts actually do the application for her? Just know energy.

Negative Experience

- Amanda gets a bad review from Mike. "I'm not sure I want to get that insurance. I'm not sure I want to get that insurance. I'm not sure I want to get that insurance."

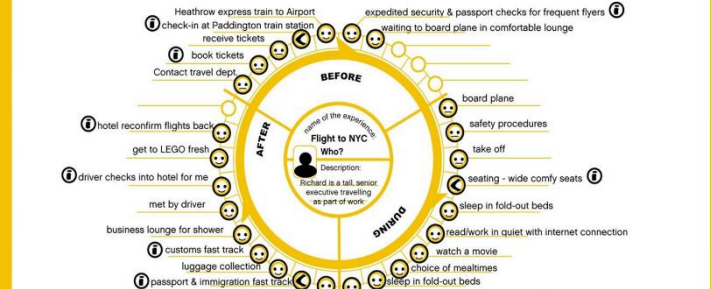
Legend

- Positive experience (Green)
- Neutral experience (Blue)
- Negative experience (Red)

Level of Effort

2.9	4.3	3.7	1.6
About the Effort I Expected	Far More Effort than I Expected	Slightly More Effort than I Expected	Far Less Effort than I Expected

LEGO Designing the Experience - Example WOW



BEFORE

- Heathrow express train to Airport
- expedited security & passport checks for frequent flyers
- check-in at Paddington train station
- waiting to board plane in comfortable lounge
- book tickets
- receive tickets
- Contact travel dept

AFTER

- hotel reconfirm flights back
- get to LEGO fresh
- driver checks into hotel for me
- met by driver
- business lounge for shower
- customs fast track
- luggage collection
- passport & immigration fast track
- short walk in airport

DURING

- board plane
- safety procedures
- take off
- seating - wide comfy seats
- sleep in fold-out beds
- read/work in quiet with internet connection
- watch a movie
- choice of mealtimes
- sleep in fold-out beds
- disembark - reserve seat for return flight

Flight to NYC Who?

Description: Richard is a tall, senior executive traveling as part of work.

Use the Experience Icons:

- How can this be a positive experience?
- Make or break moment - what can we do to make sure consumers come back time and time again?
- Where do we need data to help deliver the experience?



BUT THEY ALL HAVE SOME THINGS IN COMMON

1

Measure touch points along the journey

2

Capture your customers' attitudes and emotions

3

Help you see your experience through your customers' eyes

4

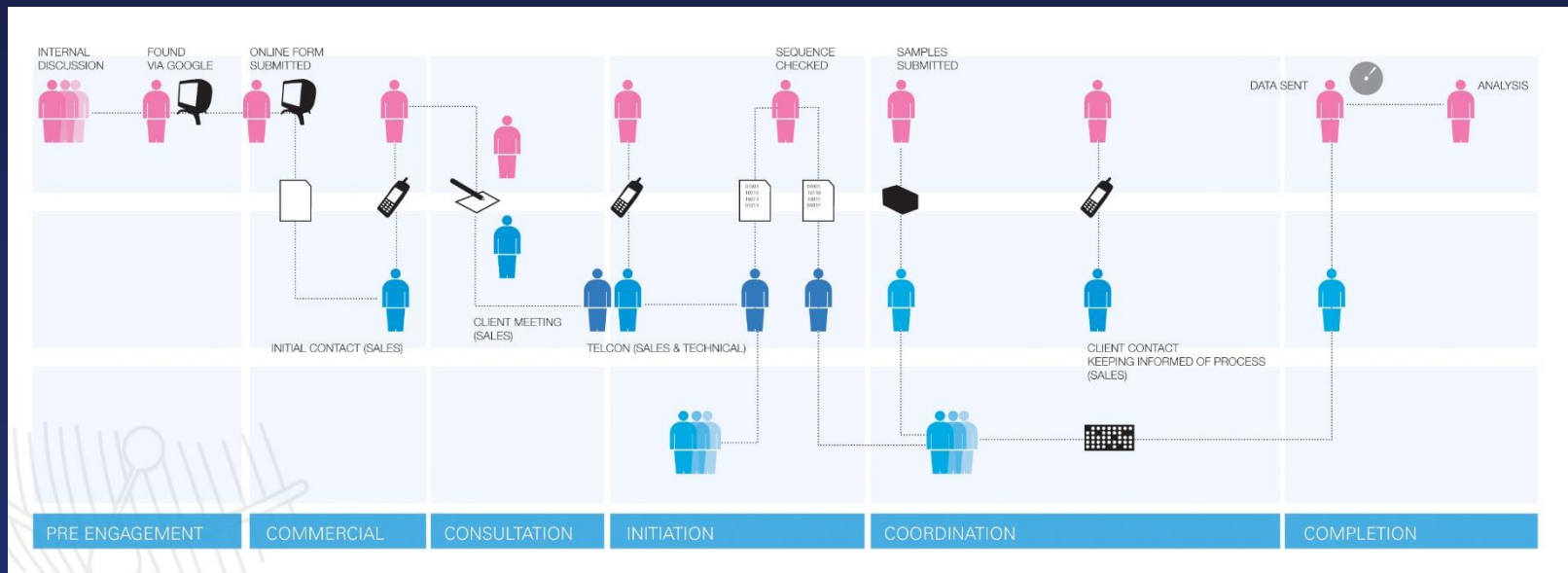
Shows your experience across touch points

5

Focus on your customer's true needs

RESEARCH-BASED MAPS

Maps that represent qualitative conversations (interviews, focus groups, journals) with your customers

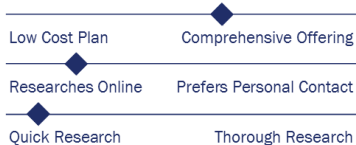


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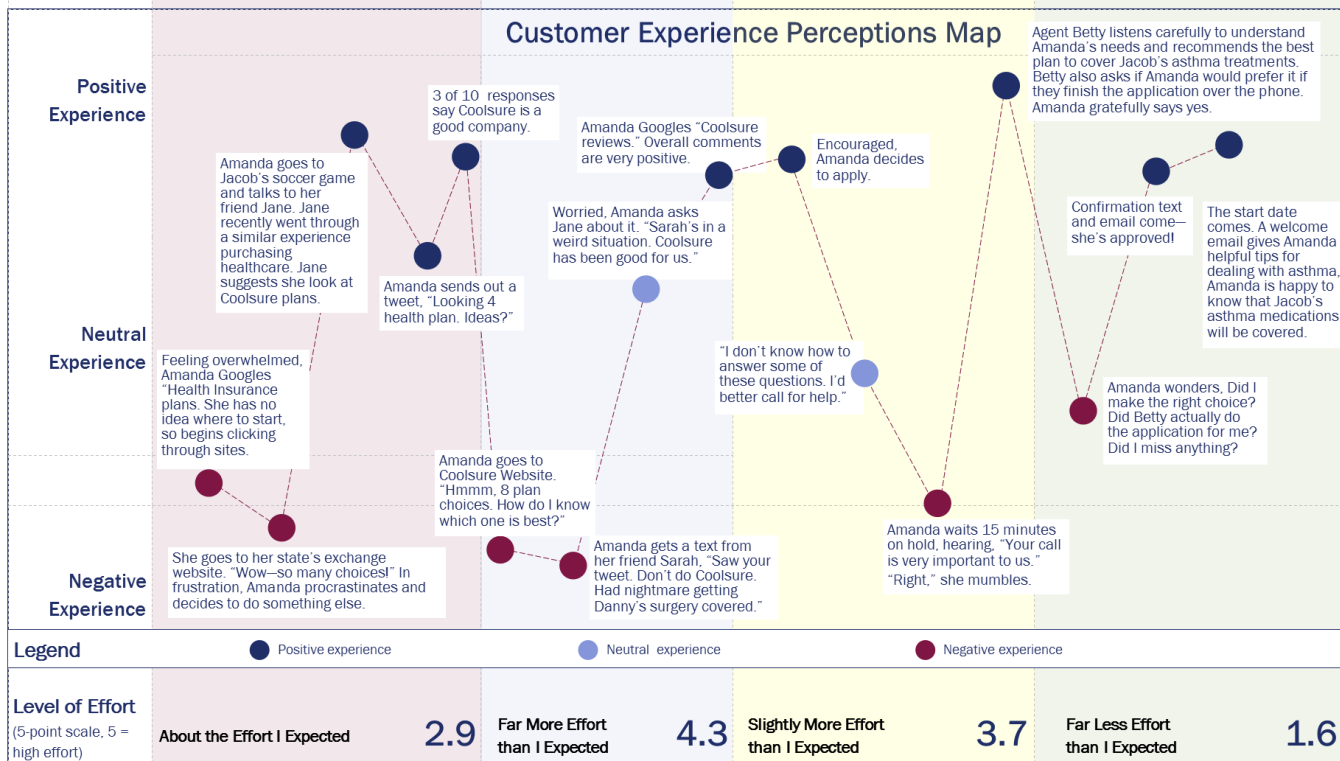
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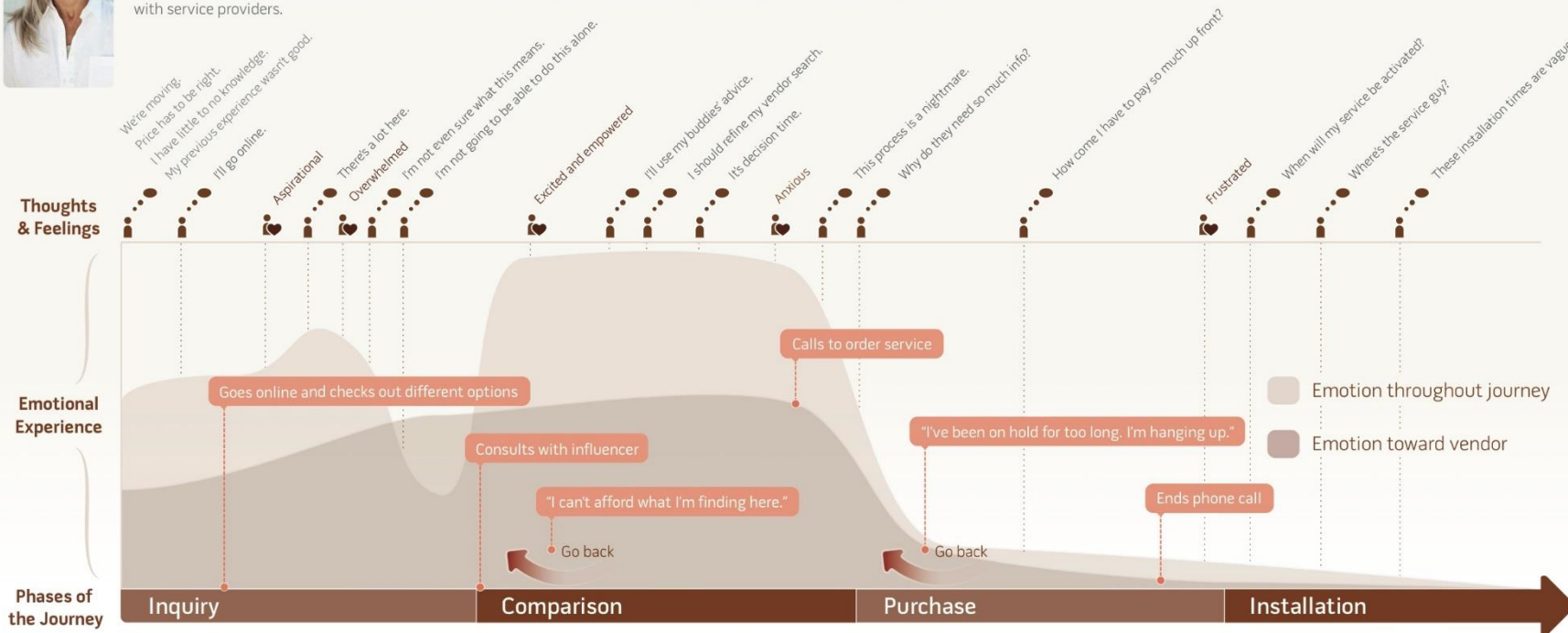


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Sarah's Broadband Provider Journey

Sarah is moving her family of three. She knows she's going to need phone and Internet service. The effective and contextual factors that will affect Sarah's choice in broadband vendors are price, and her existing knowledge of and previous experience with service providers.



Description

The Inquiry phase features the reasons people are shopping around for new service. These are usually related to moving and relocation, an upgrade to existing service or hunting down new deals. Moving is the biggest reason.

Recommendations

Design homepages with separate, targeted call-out areas lying above the fold, tailored for residential and tech-savvy customers. Internal product areas should include basic plain-English product descriptions and large price points with a clear call to action. Bullet points should include keywords that summarize options and features typically found in product datasheets.

Description

The potential customer comes into the Comparison phase usually armed with the right info and tech jargon and is looking for the lowest cost. Customers tend to be brand agnostic. If they can't find the right price or the right services, they may leave and go back to Inquiry.

Recommendations

Use IP location services to geo-locate customers – removing the current service address roadblock. This allows users to configure services before adding them to the cart and reflects bundled price discounts in a clear and obvious manner.

Description

The Purchase phase involves the provider requiring quite a bit of personal info. The order flow tends to be complex, and the process can be all over the map. There is a sense of delayed gratification – waiting on service installation and activation.

Recommendations

Reduce the amount of information required by streamlining and improving any areas that contain form fields, using industry best practices. Work on setting expectations for the Installation phase with phone customer service reps to improve the overall experience with your brand.

Description

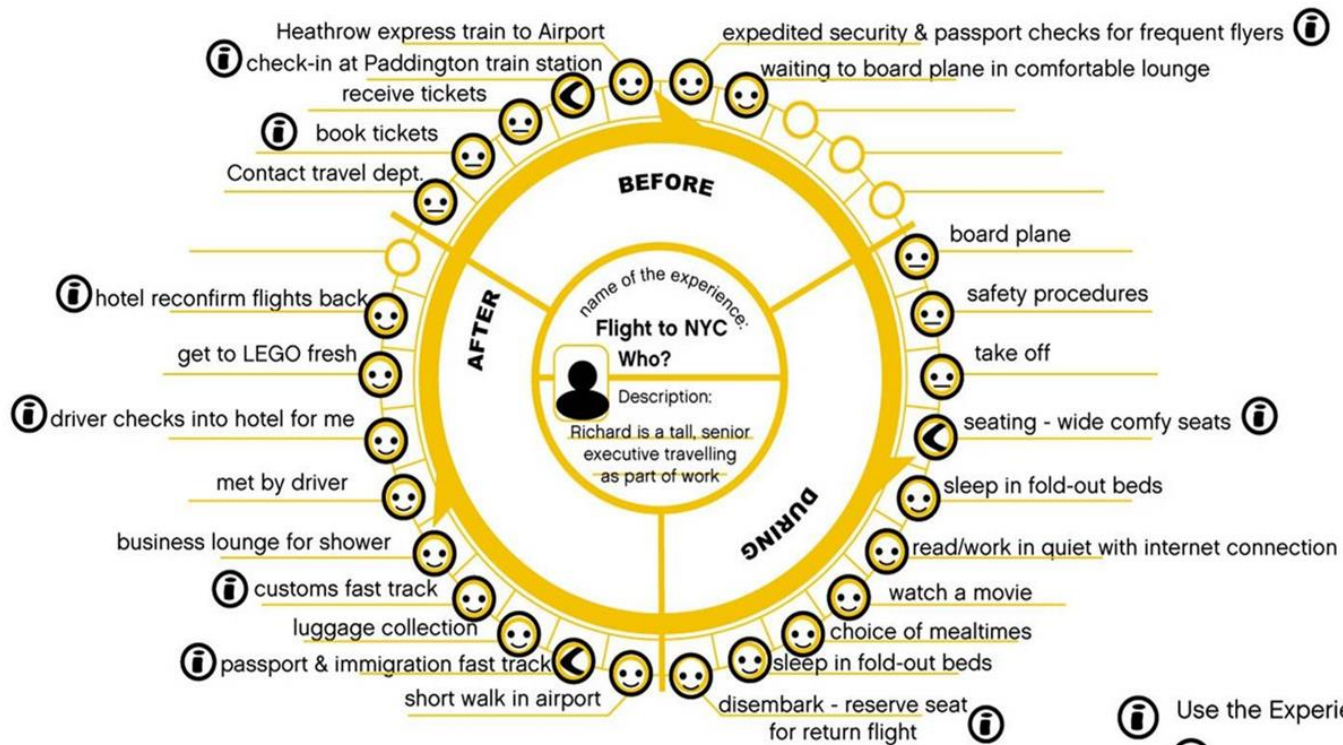
The Installation phase is the handoff from customer service to the installer. There are usually scheduling conflicts among all parties involved. This phase can be somewhat painful for the customer in dealing with the installer.

Recommendations

Many factors converge to make this phase of the customer journey unpleasant. Providing accurate arrival times, courteous technicians and clear instruction materials during installation can help alleviate the negative experience in this phase. Also, consider having leave-behind customer comment cards so customers feel empowered to give feedback into the process.



Designing the Experience - Example WOW



- Use the Experience Icons:
 - How can this be a positive experience?
 - Make or break moment - what can we do to make sure consumers come back time and time again
 - Where do we need data to help deliver the experience?

BENEFITS OF RESEARCH-BASED MAPS

Unbiased
view of your
journey

Go across
touch points

Capture your
customer's
emotions

DISADVANTAGES OF RESEARCH-BASED MAPS

Harder to
internalize

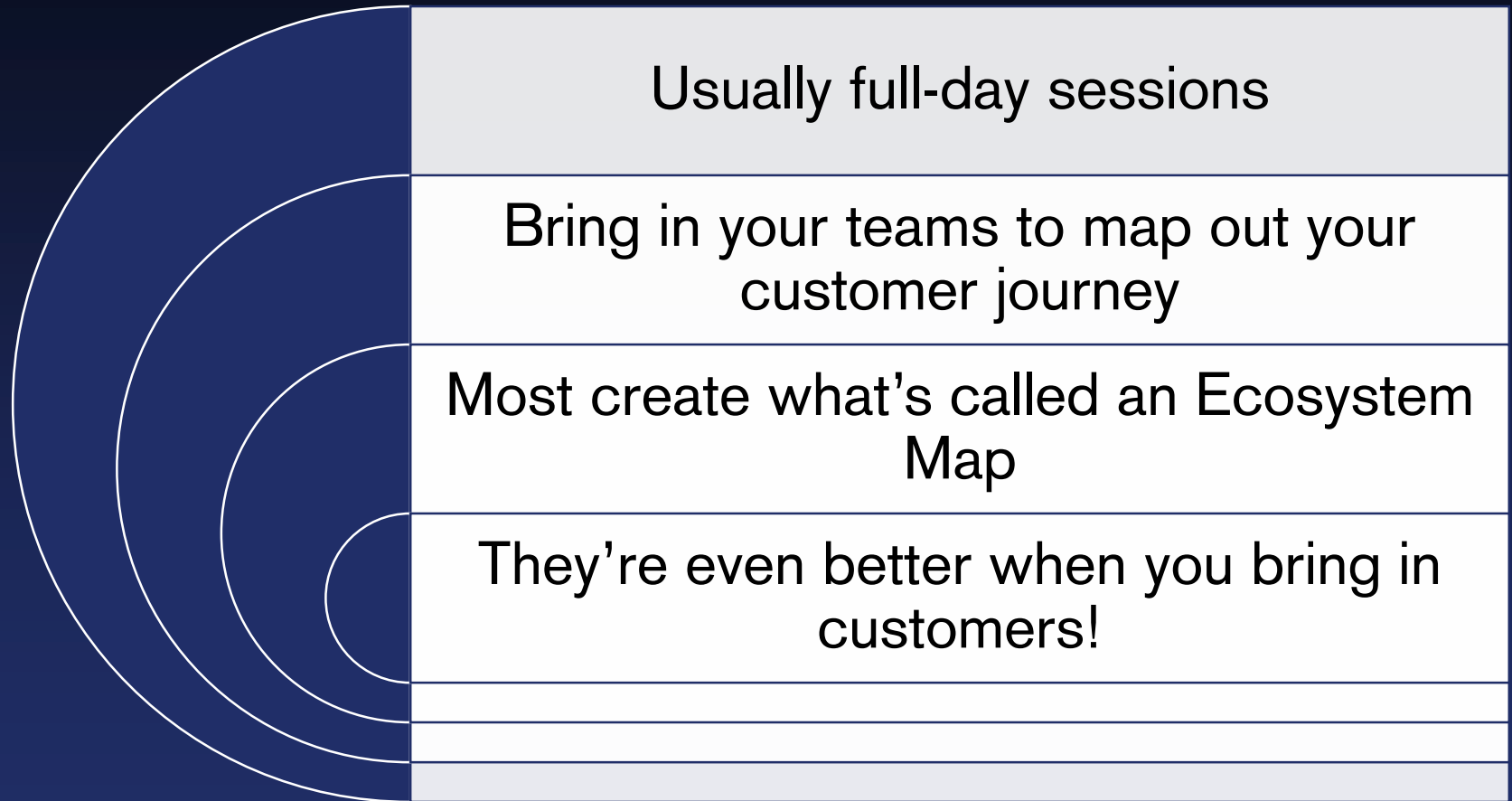
Can be
academic

Just another
research
report



JOURNEY MAPPING WORKSHOPS

JOURNEY MAPPING WORKSHOPS



Ecosystem Map: a map that goes beyond your customer to show all the parts of the company involved with the journey.

BENEFITS OF MAPPING WORKSHOPS

Create a
shared view

Immediate
internalization

Easily applied
to your
business

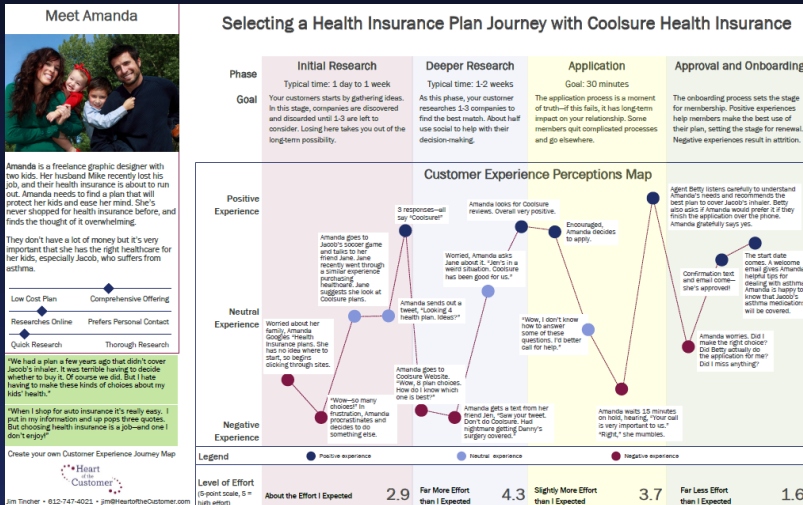
DISADVANTAGES OF MAPPING WORKSHOPS

Customers
not included

Loudest
voice can
win

Can just
reinforce
existing work

THE ANSWER



Research-Based Maps

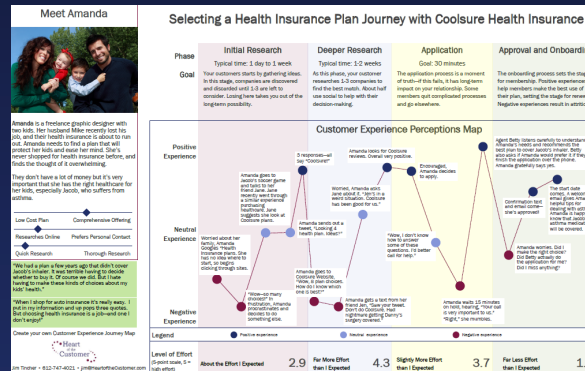
Mapping Workshops

COMPREHENSIVE JOURNEY MAPPING

Road to Success



Hypothesis
Workshop



Research-
Based Maps



Journey
Mapping
Workshops

START WITH A PERSONA

Personas represent segments of your customers

They help you visualize the customer you're designing for



Different personas often experience your product or service very differently

Meet Amanda

Mother of two

Millennial

Son Jacob
has asthma

Husband
recently lost
his job

Freelance
graphic
designer

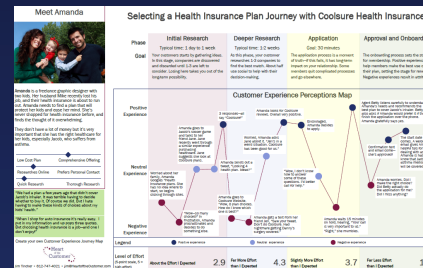


COMPREHENSIVE JOURNEY MAPPING

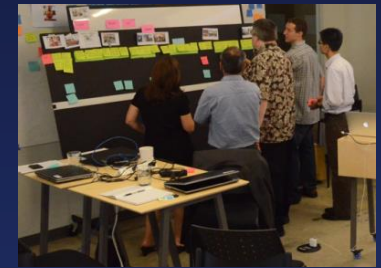
Road to Success



Hypothesis
Workshop



Research-
Based Maps



Journey
Mapping
Workshops

STEP 1: BUILD A HYPOTHESIS MAP

Lay out a typical customer journey with your teams



BUILD A HYPOTHESIS MAP

Start with
a persona

Document that person's steps in
their experience

Add their
attitudes
at each
step

BUILD A HYPOTHESIS MAP

Start with
a persona

Document that person's steps in
their experience



Amanda

DOCUMENT YOUR CUSTOMER'S STEPS

Hypothesized steps to choose a health plan



Write one step per yellow sticky note. Have one person from your group go first, then have a second person add additional steps.

BUILD A HYPOTHESIS MAP

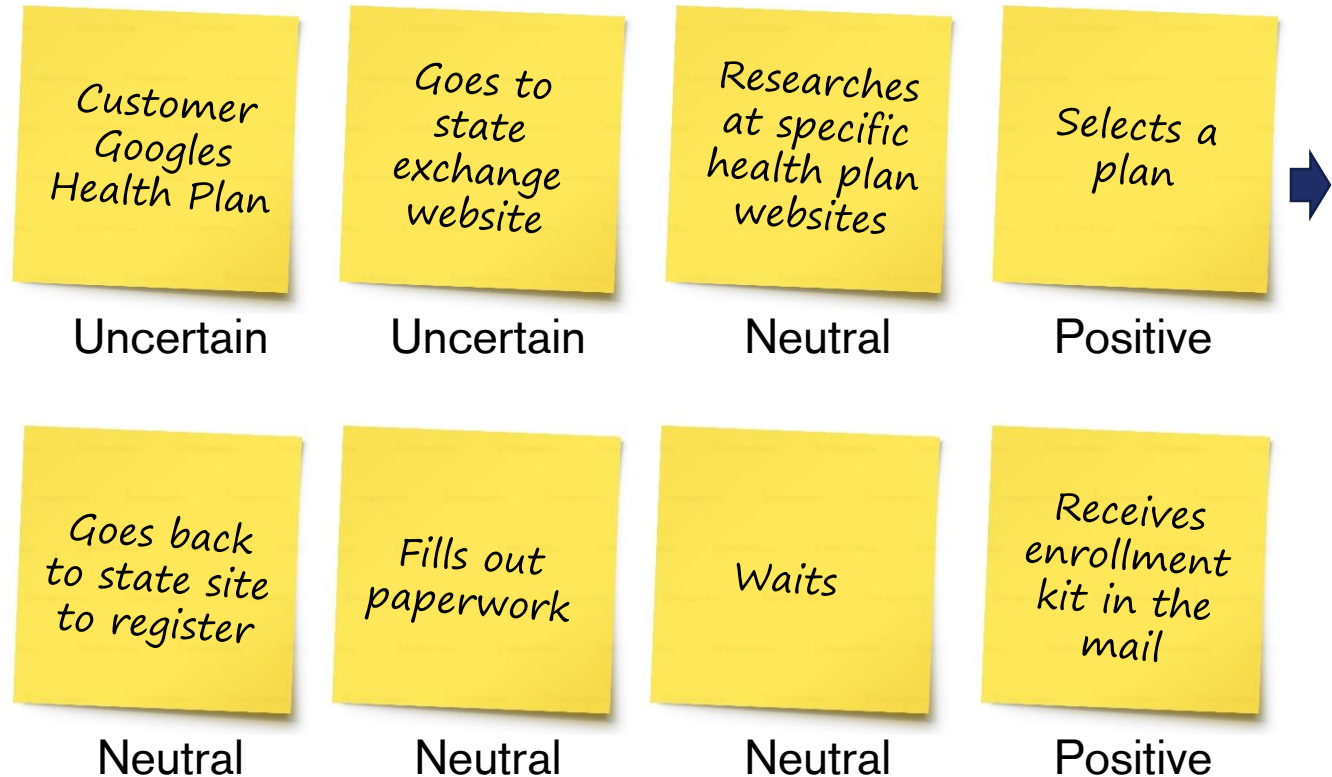
Start with a persona



Amanda

Add their attitudes at each step

Document that person's steps in their experience



BEST PRACTICES IN HYPOTHESIS MAPPING

Who do I include?

Be inclusive! Invite whoever you need to drive your customer-centered change. Product management, marketing, operations, etc. Try for a mix of leadership and individual contributors.

How many people?

10-12 is ideal. More than 20 and you'll want to do multiple groups, either on the same topic or perhaps with related experiences or different personas.

How long should it go?

1-2 hours for the hypothesis map, depending on the number of participants and complexity of the journey.

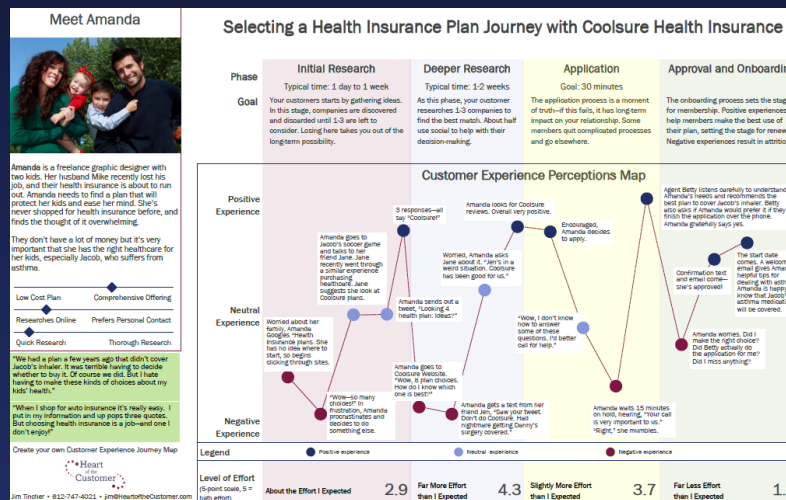
The skills and setup required to run a Hypothesis Workshop are the same as for the Journey Mapping Workshop, which we'll spend most of today on.

COMPREHENSIVE JOURNEY MAPPING

Road to Success



Hypothesis
Workshop



Research-
Based Maps

Journey
Mapping
Workshops



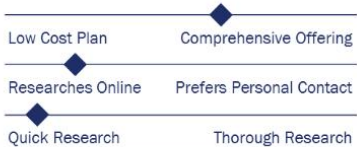
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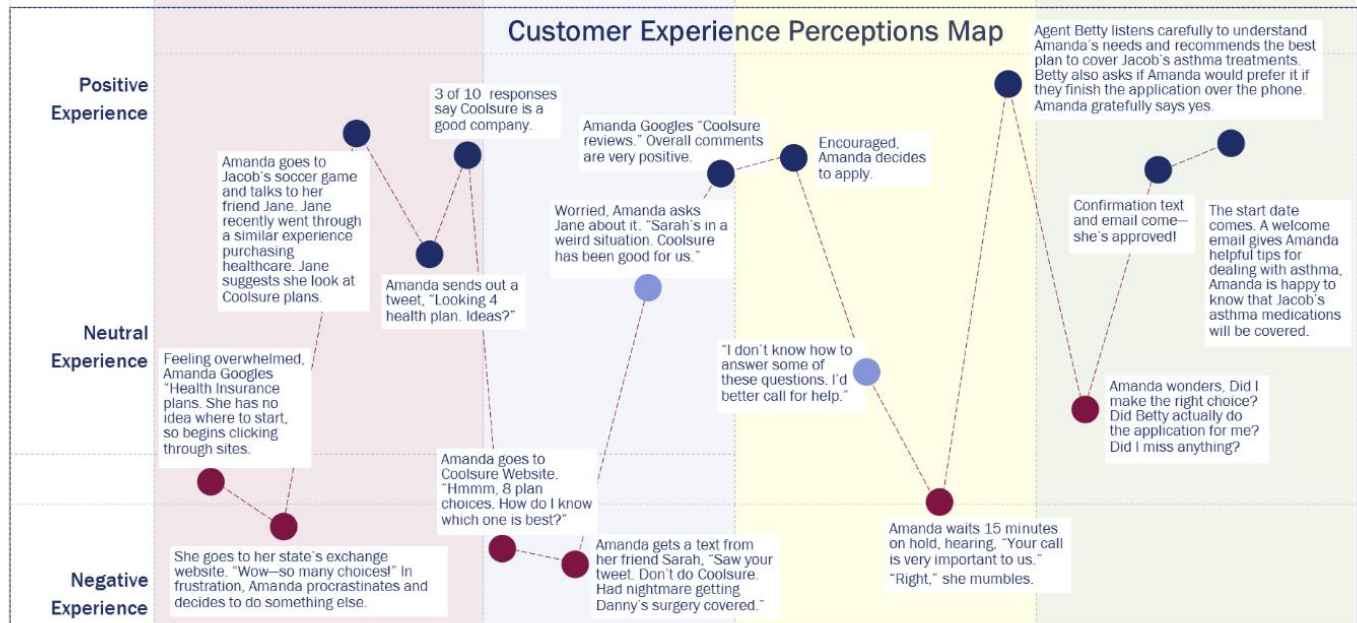
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Legend	● Positive experience	● Neutral experience	● Negative experience
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Level of Effort	About the Effort I Expected	2.9	Far More Effort than I Expected	4.3	Slightly More Effort than I Expected	3.7	Far Less Effort than I Expected	1.6
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BUILD A RESEARCH-BASED MAP

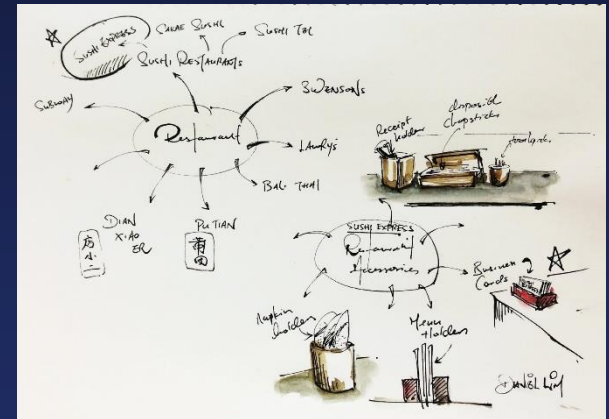
Use customer research to capture actual steps and attitudes

This is a qualitative process – don't use surveys



Focus groups

Customer interviews



Customer journaling

BEST PRACTICES IN RESEARCH-BASED JOURNEY MAPPING

Whom do I
interview?

Break your customers into segments and interview enough representatives of each to find common themes.

Why do I
need
segments?

Customers are different! Treating them all the same gives you a watered-down map that applies to no one.

Can I just use
existing
research?

Maybe, but existing research tends to focus on touch points, as opposed to an end-to-end journey.

MORE ON RESEARCH-BASED JOURNEY MAPS

Creating a Customer- Focused Customer Experience Journey Map

10+4 Principles to Capture Your
Customer Experience

<http://www.heartofthecustomer.com/wp-content/uploads/2013/05/Creating-a-Customer-Focused-Customer-Experience-Map-White-Paper1.pdf>



**Creating a Customer-Focused
Customer Experience Journey Map**

10+4 Principles to Capture Your Customer Experience

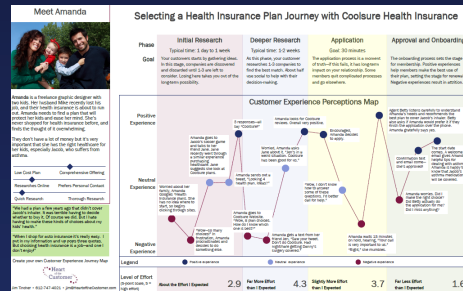
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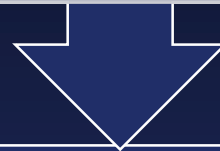
SETUP

Start with the basics

One persona

One specific journey

Concurrent groups could map different combinations

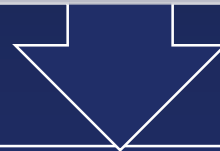


Invite 10-12 members to help with the map. Include:

Those who interact with customers every day

Those who need to support the decision

Combination of leadership and front-line members



Setup

Allocate a full day

Have members research your journey ahead of time

Setup room with customer verbatims and stats

SETUP

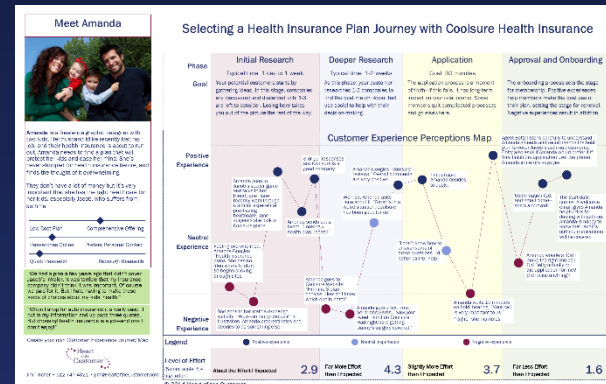
Start with the basics

One persona

One specific journey



Amanda



Choosing a health plan

Invite 10-12 members to help with the map. Include:

Those who interact with customers every day

Those who need to support the decision

Combination of leadership and line teams

FOR TODAY



Go to a mapping area



Select a name tag and a role



Read your role description

REVIEW YOUR HYPOTHESIS MAP

Start with
a persona



Amanda

Add their
attitudes
at each
step

Document that person's steps in
their experience

Customer
Googles
Health Plan

Uncertain

Goes to
state
exchange
website

Uncertain

Researches
at specific
health plan
websites

Neutral

Selects a
plan

Positive

Goes back
to state site
to register

Neutral

Fills out
paperwork

Neutral

Waits

Neutral

Receives
enrollment
kit in the
mail

Positive

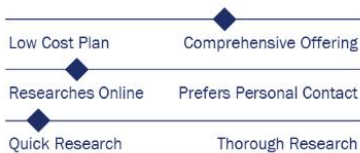
REVIEW YOUR RESEARCH MAP

Meet Amanda



Amanda is a freelance graphic designer with two kids. Her husband Mike recently lost his job, and their health insurance is about to run out. Amanda needs to find a plan that will protect her kids and ease her mind. She's never shopped for health insurance before, and finds the thought of it overwhelming.

They don't have a lot of money but it's very important that she has the right healthcare for her kids, especially Jacob, who suffers from asthma.



"We had a plan a few years ago that didn't cover Jacob's inhaler. It was terrible that my insurance company didn't think it was important. Of course we paid for it. But I hate having to make these kinds of choices about my kids' health."

"When I shop for auto insurance it's really easy. I put in my information and up pops three quotes. But choosing health insurance is a job—and one I don't enjoy!"

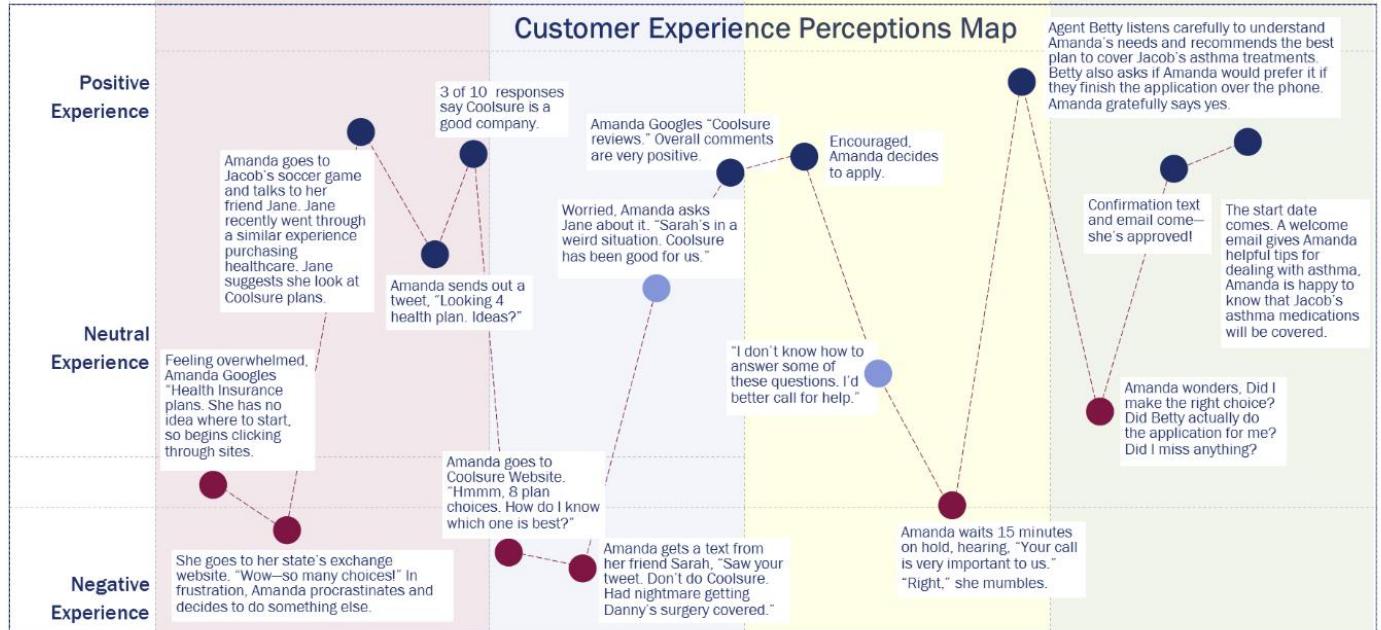
Create your own Customer Experience Journey Map



Jim Tincher • 612-747-4021 • jim@HeartoftheCustomer.com

Selecting a Health Insurance Plan Journey with Coolsure Health Insurance

Phase	Initial Research	Deeper Research	Application	Approval and Onboarding
Typical time:	1 day to 1 week	1-2 weeks	Goal: 30 minutes	
Goal	Your potential customers starts by gathering ideas. In this stage, companies are discovered and discarded until 1-3 are left to consider. Losing here takes you out of the picture the rest of the way.	As this phase, your customer researches 1-3 companies to find the best match. About half use social to help with their decision-making.	The application process is a moment of truth—if this fails, it has long-term impact on your relationship. Some members quit complicated processes and go elsewhere.	The onboarding process sets the stage for membership. Positive experiences help members make the best use of their plan, setting the stage for renewal. Negative experiences result in attrition.



Legend	● Positive experience	● Neutral experience	● Negative experience		
Level of Effort (5-point scale, 5 = high effort)	About the Effort I Expected	2.9 Far More Effort than I Expected	4.3 Slightly More Effort than I Expected	3.7 Far Less Effort than I Expected	1.6

A blue dune buggy is shown in motion on a dirt track. The vehicle is angled towards the right, and its rear wheels are kicking up a large, dense cloud of brown dust that fills the right side of the frame. The background is a blurred landscape of green grass and a dirt path. The overall scene conveys a sense of speed and action.

Time for

Action!

STEP 1 – DOCUMENT YOUR CUSTOMER'S STEPS IN YOUR EXPERIENCE

Display the steps Amanda takes as she researches a health plan

Amanda first...

She goes...

Then she...

After that...

TIP

You need to view your journey as your customer does, which is why research-based maps help. If you don't capture your customer's true steps here, the rest of the process will suffer.

Write one step per yellow sticky note. Have one person from your group go first, then have a second person add additional steps.

STEP 2- DOCUMENT YOUR CUSTOMER'S GOALS

What is your customer trying to do at each step?
Multiple steps may have the same goal.

Experience
Steps

*Amanda
first...*

*She
goes...*

*Then
she...*

*After
that...*

Customer
Goals

*Learn how
the process
works*

*Discover
possibilities*

*Discard
some
vendors*

*Choose 2 or
3 companies
to research
further*

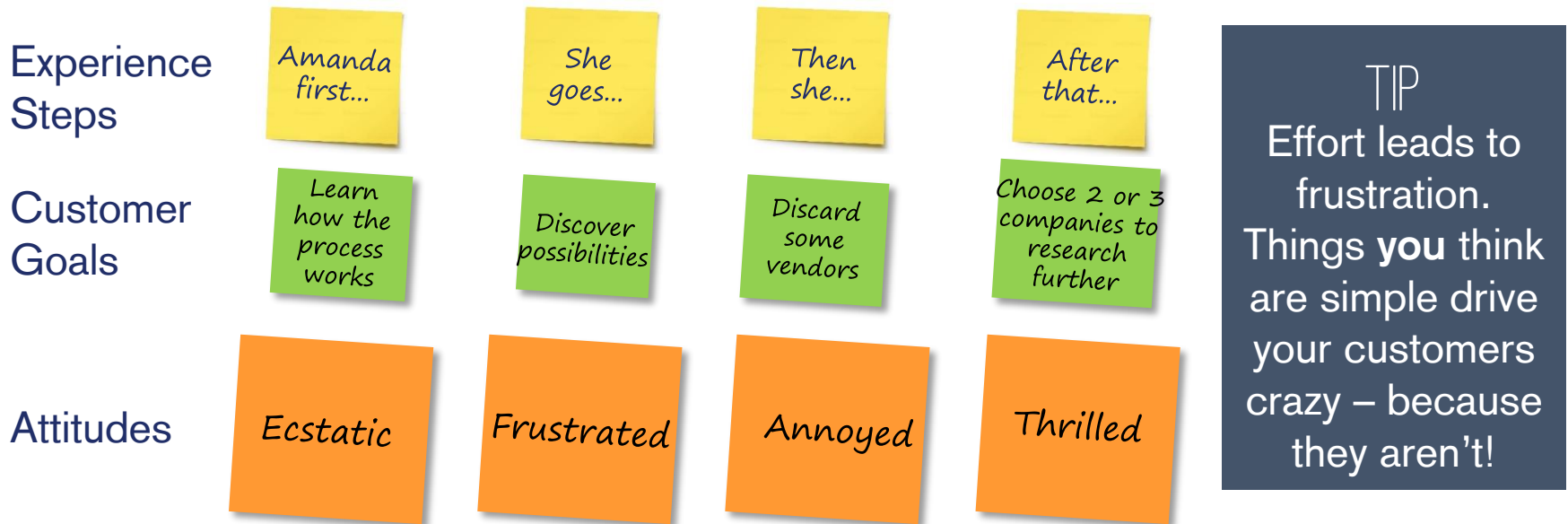
TIP

Represent the goal from your customer's eyes. "Get a plan that doesn't suck" or "Get something cheap" are actual goals for some customers.

Write your customer's goals for each step on a green sticky note. Have one person from your group go first and place their ideas on goals below each yellow sticky note, then discuss and see if there is disagreement. Use your research journey map if available.

STEP 3- DOCUMENT YOUR CUSTOMER'S ATTITUDES AND EMOTIONS

How does your customer feel? Go beyond “Sad” or “Neutral” – what is she really feeling?



Write your customer's attitude on an orange sheet under the appropriate green sticky note. Have one person go first, then see if there is agreement.

STEP 4 - WHO DOES YOUR CUSTOMER INTERACT WITH ON HER JOURNEY?

Document the people and groups your customer works with at each stage

Experience Steps	Amanda first...	She goes...	Then she...	After that...
Customer Goals	Learn how the process works	Discover possibilities	Discard some vendors	Choose 2 or 3 companies to research further
Attitudes	Ecstatic	Frustrated	Annoyed	Thrilled
Groups interacted with	Sales person	Call center		Call center

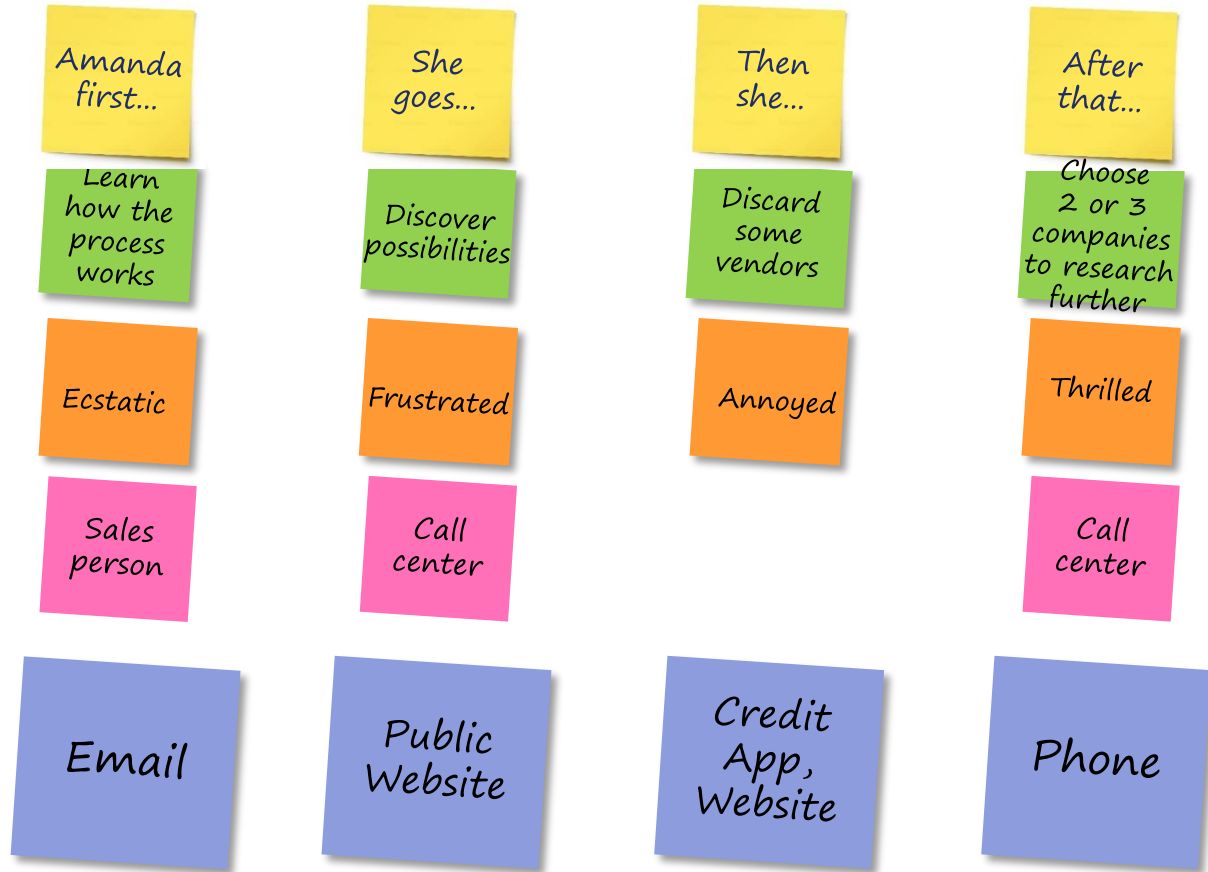
TIP
At this point you may discover you missed some Experience Steps – go ahead and add them to the top. That's why we use Post-It

Document who your customer contacts to – either directly or virtually. There may be some steps without this line.

STEP 5 - WHAT OBJECTS DOES YOUR CUSTOMER INTERACT WITH AT EACH STEP?

Document the systems, paperwork and physical objects for each stage

Systems and objects interacted with



What physical or virtual objects do your customers interact with? Have one person put up a blue sticky note first, then have others add to it. You may find that some steps have multiple objects.

STEP 6 - WHERE ARE THE FRICTION POINTS?

Where is your customer feeling the pain? Where is the friction in your customer experience?



Give each participant three dots. Put the dots where you see the most friction in your customer experience. Use your research-based map to help you, if available.

A hand in a white glove pulls a vibrant red velvet curtain to the right. In the background, two bright stage spotlights glow against a dark backdrop. The scene is set in a theater or stage environment.

TIME TO MOVE

BACKSTAGE

CUSTOMER PROBLEMS OFTEN ORIGINATE BACKSTAGE

Decisions made here can have dramatic impacts on your customers. Typical causes:

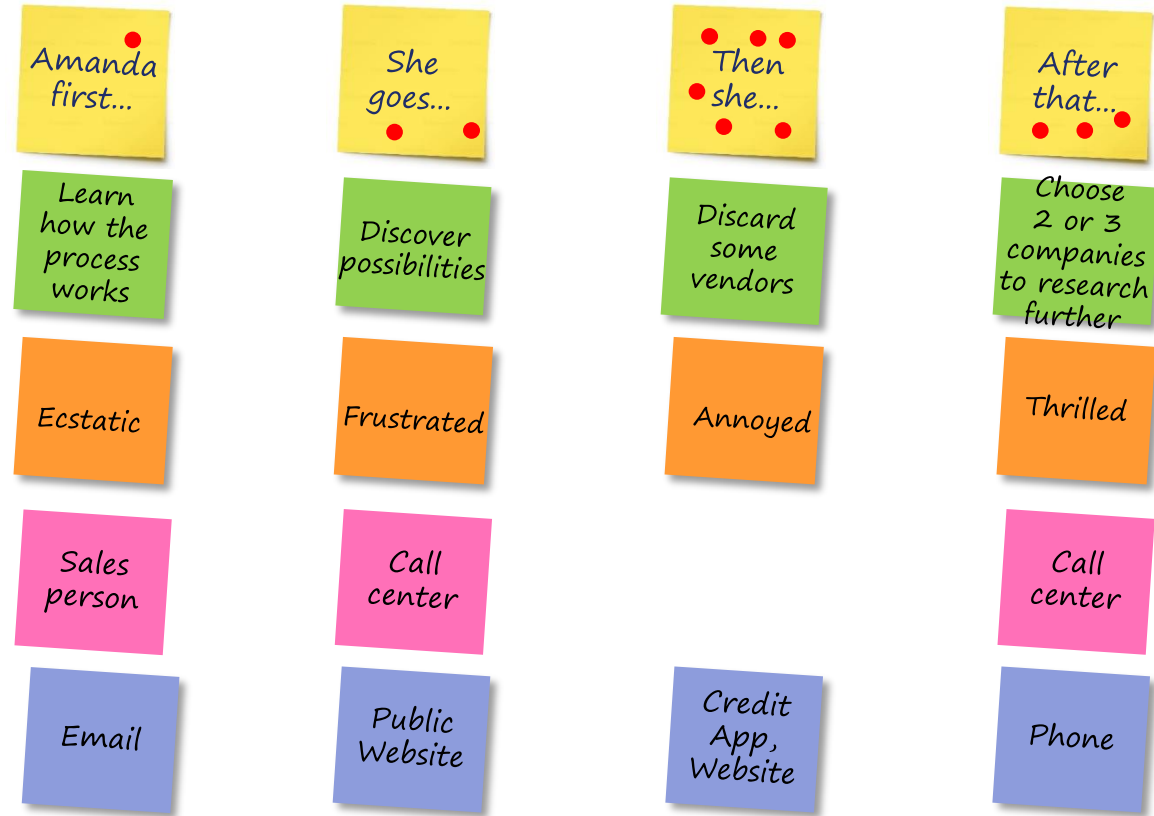
Misaligned Incentives

Solving your problems instead of your customer's

Lack of backstage teams' knowledge about customer problems

STEP 7 - DRAW A LINE TO SEPARATE YOUR BACKSTAGE PROCESSES

Visually represent moving backstage

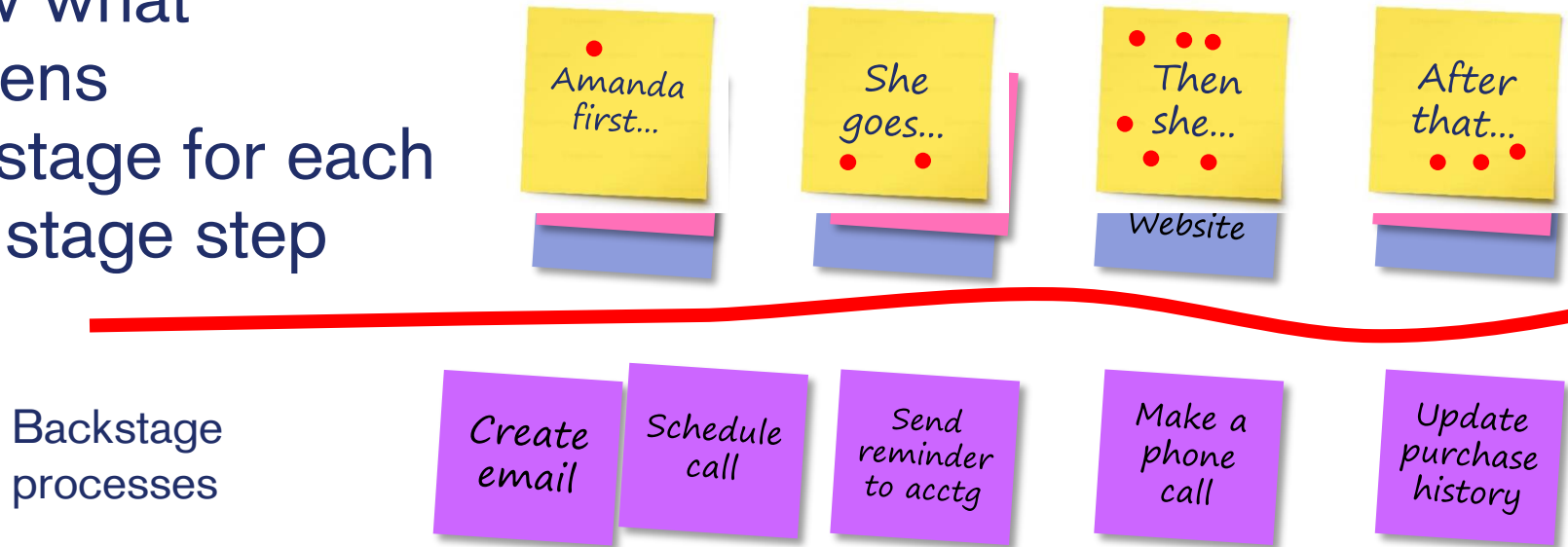


Backstage

Use a ribbon, string, or just draw a line with a marker to show the separation between front-stage and backstage.

STEP 8 - DOCUMENT YOUR BACKSTAGE ACTIVITIES

Show what happens backstage for each front stage step



What happens backstage for each customer-facing step? Do you create invoices or generate a need for a call? Have one person put up a purple note first, then add from others. You may have multiple backstage process steps for each front stage Experience Step.

STEP 9 - SHOW THE BACKSTAGE GROUPS INVOLVED WITH EACH STEP

Show the groups for each backstage step

Amanda first...

She goes...

Then she...
Website

After that...

Create email

Schedule call

Send reminder to acctg

Make a phone call

Update purchase history

Backstage groups

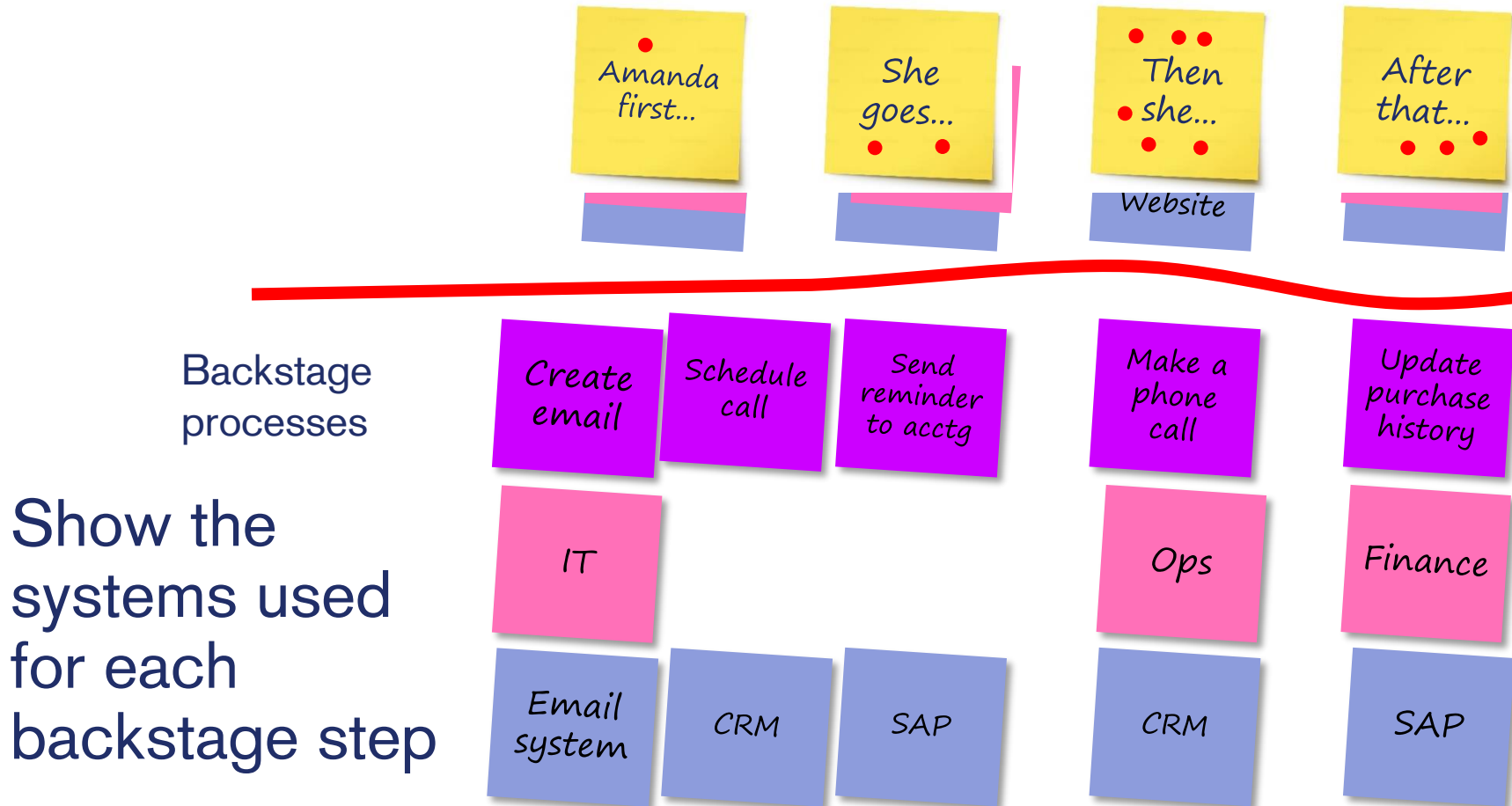
IT

Ops

Finance

Show which groups or individuals are involved with each step – use pink notes again. You may find that front stage members may become less involved at this stage of the discussion, whereas IT, Finance and Ops may become more active. **Avoid finger-pointing**

STEP 10 - SHOW THE BACKSTAGE SYSTEMS INVOLVED WITH EACH STEP

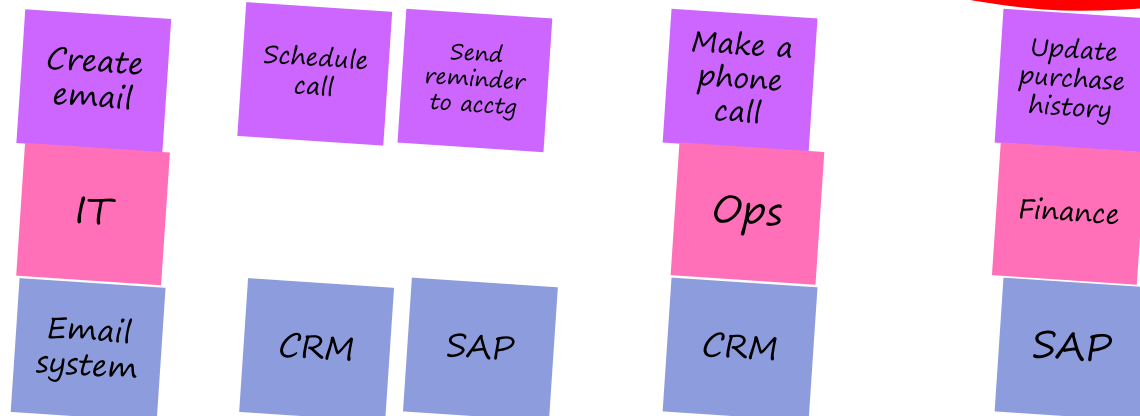
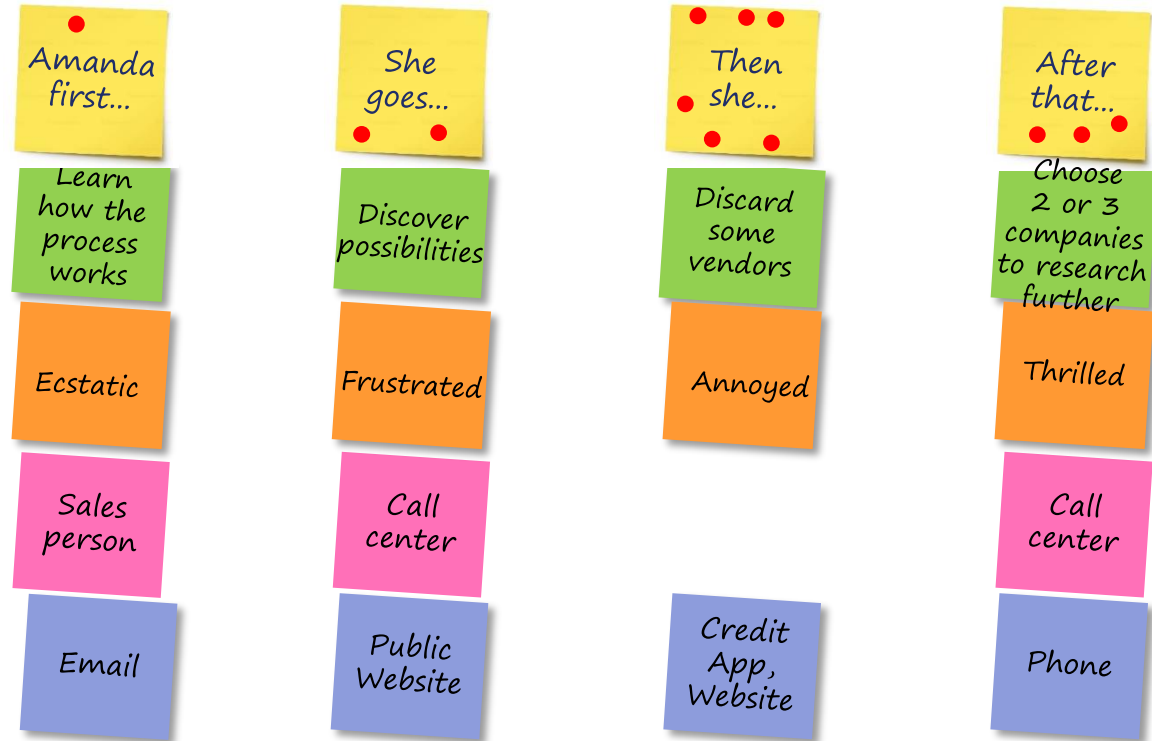


Show the systems used for each backstage step

Show which systems are used at each step – use blue notes again. It is critical to document systems used, as your systems often force processes that can break your customer experience.

STEP BACK

Look at your map – what are you missing?
Does your team feel this accurately represents your customer experience and ecosystem?



YOU'RE FINISHED!



With the
map, that is.

**NOT with
the job!**

TODAY'S TOPICS

The
Importance
of
Customer
Experience

What is a
Journey
Map?

Leading a
Journey
Map
Workshop

Creating
Change
through Maps

NOW
WHAT?

PRIORITIZE



YOU MUST

SELECT ONE AREA OF FOCUS – AN INTERACTION TO IMPROVE



Use your Customer Experience Design Canvas to highlight one opportunity.

Existing Experience	Insight	New Attitude	
Customer Step(s)	Experience Need		
Customer Goals			
Attitudes and Emotions			
Front Stage Groups Involved			
Front Stage Systems	Insight	New Behavior	
Backstage Processes	Emotional Need		
			Backstage Groups
			Backstage Systems

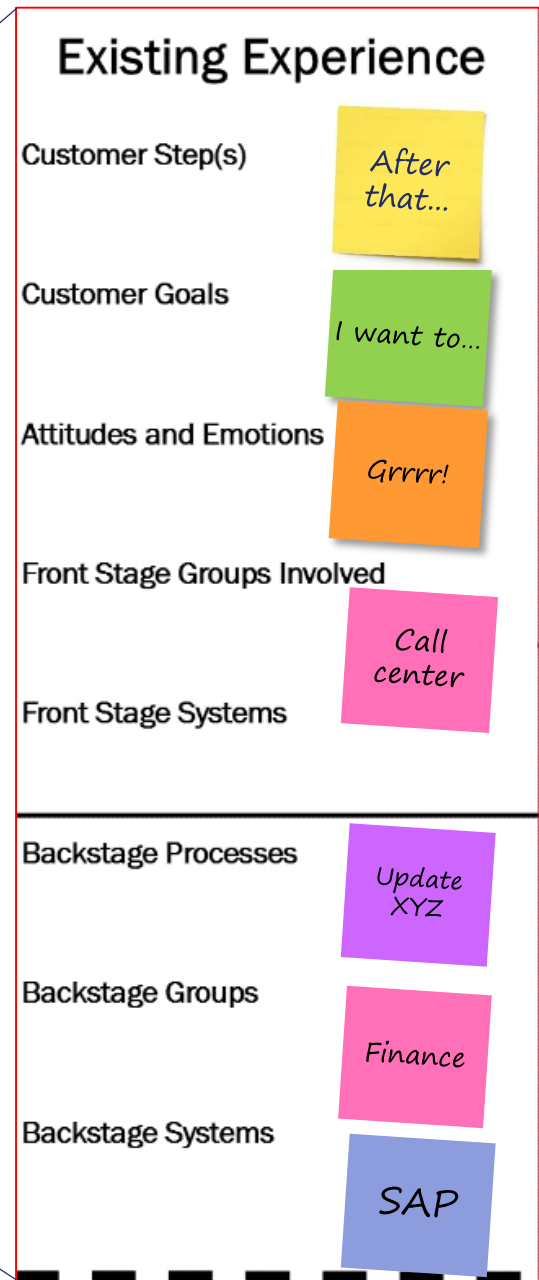
New Experience	Business Impact	Next Steps	
Customer Step(s)		Steps	
Customer Goals			
Attitudes and Emotions			
Front Stage Groups Involved	Changes Needed	Champion	
Front Stage Systems	Systems/Processes needing change		
Backstage Processes	Process/Product Owner(s)		
Backstage Groups	Other Teams impacted		
Backstage Systems		Support Team	

Thanks to Oracle at www.DesigningCX.com for the inspiration for this Canvas.

START WITH YOUR EXISTING EXPERIENCE

Enter your existing experience into your Design Canvas. You can simply move your Post-It Notes, or use new ones.

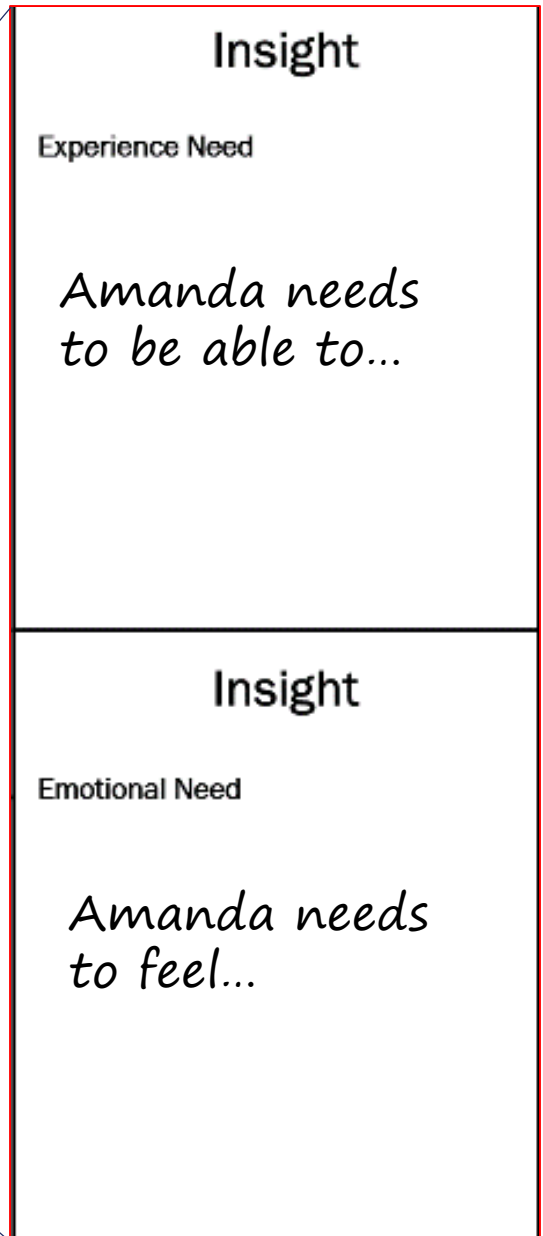
Existing Experience	Insight	New Attitude
Customer Step(s)	Experience Need	
Customer Goals		
Attitudes and Emotions		
Front Stage Groups Involved		
Front Stage Systems	Insight	New Behavior
Backstage Processes	Emotional Need	
Backstage Groups		
Backstage Systems		
New Experience	Business Impact	Next Steps
Customer Step(s)		Steps
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Backstage Groups		Support Team
Backstage Systems	Other Teams impacted	



FOCUS ON YOUR CUSTOMER'S NEEDS

Enter your insights on your customer's needs. Remember – describe these needs from her perspective. What does she need from the journey to fulfill her emotional needs?

Existing Experience	Insight	New Attitude
Customer Steps(s)	Experience Need	
Customer Goals		
Attitudes and Emotions		
Front Stage Groups Involved		
Front Stage Systems	Insight	New Behavior
Backstage Processes	Emotional Need	
Backstage Groups		
Backstage Systems		
New Experience	Business Impact	Next Steps
Customer Steps(s)		Steps
Customer Goals		
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BRAINSTORM IDEAS

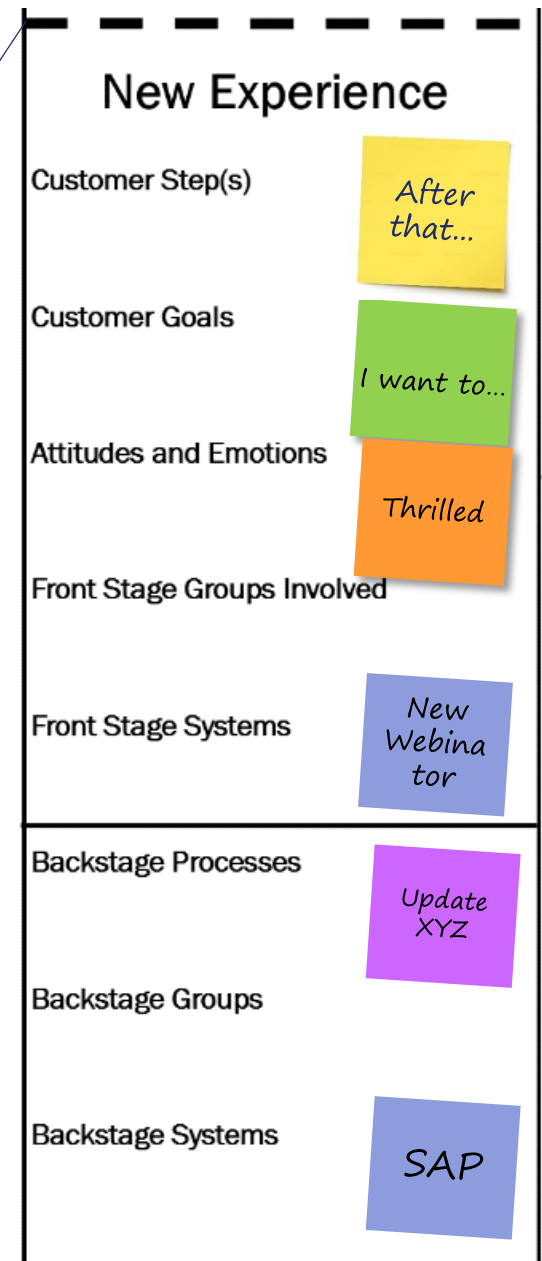


What can you do to fulfill
your customer's needs?

DESIGN YOUR NEW EXPERIENCE

Build out your new experience. If you have time, update your journey map with your new experience. If not, simply place the items here using new Post-It Notes.

Existing Experience	Insight	New Attitude
Customer Step(s)	Experience Needs	
Customer Goals		
Attitudes and Emotions		
Front Stage Groups Involved		
Front Stage Systems	Insight	New Behavior
Backstage Processes	Emotional Need	
Backstage Groups		
Backstage Systems		
New Experience	Business Impact	Next Steps
Customer Step(s)		Steps
Customer Goals		
Attitudes and Emotions		
Front Stage Groups Involved	Changes Needed	Champion
Front Stage Systems	Systems/Processes needing change	
Backstage Processes	Process/Product Owner(s)	
Backstage Groups		Support Team
Backstage Systems	Other Teams impacted	



HOW DO YOU WANT HER EXPERIENCE TO CHANGE?

What new attitudes/emotions and behaviors do you want your customer to have?

Existing Experience	Insight	New Attitude
Customer Steps(s)	Experience Need	
Customer Goals		
Attitudes and Emotions		
Front Stage Groups Involved		
Front Stage Systems	Insight	New Behavior
Backstage Processes	Emotional Need	
Backstage Groups		
Backstage Systems		
<hr style="border-top: 1px dashed black;"/>	<hr style="border-top: 1px dashed black;"/>	<hr style="border-top: 1px dashed black;"/>
New Experience	Business Impact	Next Steps
Customer Steps(s)		Steps
Customer Goals		
Attitudes and Emotions		
Front Stage Groups Involved	Changes Needed	Champion
Front Stage Systems	Systems/Processes needing change	
Backstage Processes	Process/Product Owner(s)	Support Team
Backstage Groups		
Backstage Systems	Other Teams impacted	

New Attitude

Relaxed, and at ease feeling like I know what I'm doing.

New Behavior

Quickly get through process, and tell my friends how easy it was. I have no reason to quit halfway through – it's too easy!

CALCULATE YOUR BUSINESS IMPACT

Call reduction	*	Cost/call	=	Cost savings
Additional purchases	*	Average purchase	=	New revenue
Increased loyalty	*	Revenue/month	=	Increased revenue
Additional Referrals	*	Revenue/referral	=	New revenue
Lower cancellations	*	Revenue/month	=	Increased revenue
Increased conversion rate	*	Average sales	=	Increased revenue
Fewer giveaways to angry callers	*	Reduced angry callers	=	Cost savings

WHAT IS THE BUSINESS IMPACT?

Detail the business impact. Use dollar impact whenever possible to help create a customer-centric ROI.

Existing Experience	Insight	New Attitude
Customer Step(s)	Experience Need	
Attitudes and Emotions		
Customer Goals		
Front Stage Groups Involved		
Front Stage Systems	Insight	New Behavior
Backstage Processes	Emotional Need	
Backstage Groups		
Backstage Systems		
New Experience	Business Impact	Next Steps
Customer Step(s)		Steps
Attitudes and Emotions		
Customer Goals		
Front Stage Groups Involved	Changes Needed	Champion
Front Stage Systems	Systems/Processes needing change	
Backstage Processes	Process/Product Owner(s)	
Backstage Groups		Support Team
Backstage Systems	Other Teams impacted	

Business Impact

25% less customers will abandon the enrollment process, resulting in 2,000 new members each year, creating \$94,000 in monthly revenue.

WHAT NEEDS TO CHANGE?

Detail what changes need to be made to accomplish your change. Who do you need to reach out to? Ideally, they are on this mapping team.

Existing Experience	Insight	New Attitude
Customer Step(s)	Experience Need	
Attitudes and Emotions		
Customer Goals		
Front Stage Groups Involved		
Front Stage Systems	Insight	New Behavior
Backstage Processes	Emotional Need	
Backstage Groups		
Backstage Systems		
New Experience	Business Impact	Next Steps
Customer Step(s)		Steps
Attitudes and Emotions		
Customer Goals		
Front Stage Groups Involved	Changes Needed	Champion
Front Stage Systems		
Backstage Processes	Process/Product Owner(s)	
Backstage Groups		Support Team
Backstage Systems	Other Teams impacted	

Changes Needed

Systems/Processes needing change
We will need to create the Webinator, and update the website with it.
Process/Product Owner(s)
Bob, IT Director

Other Teams impacted

Product will need to be onboarded; marketing will give input.

WHAT'S NEXT?

What needs to be done next?
 Who will lead the charge?
 Who will help?

Existing Experience	Insight	New Attitude
Customer Step(s)	Experience Need	
Attitudes and Emotions		
Customer Goals		
Front Stage Groups Involved		
Front Stage Systems	Insight	New Behavior
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Front Stage Systems	Systems/Processes needing change	
Backstage Processes	Process/Product Owner(s)	Support Team
Backstage Groups		
Backstage Systems	Other Teams impacted	

Next Steps

Steps

Put together a funding request to start design of the Webinator.

Champion

Jill, Director of Product Management

Support Team

*Betty from Product
 Jack from Call Center
 Cindy from Marketing*

CREATE YOUR CUSTOMER-CENTRIC CHANGE CHARTER

Customer-Centric Change Charter

If we create:

This will solve/enable:

(Description of your new experience)

(Your customer's problems or opportunities)

To do this, we need to:

(People + Process + Technology)

New attitudes/behaviors, and the business results behind it)

Signed,



www.HeartoftheCustomer.com
612-747-4021
jim@HeartoftheCustomer.com

CREATE YOUR CUSTOMER-CENTRIC CHANGE CHARTER

Customer-Centric Change Charter

If we create:

Plan
Picker

An automated plan picker (the Webinator) to help our customers understand our different plans

(Description of your new experience)

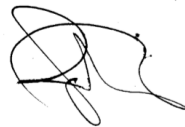
To do this,
we need to:

Update
Website

Work with subject matter experts to create the Webinator, and program the picker in our website.

(People + Process + Technology)

Signed,



This will
solve/enable:

Discover
possibilities

Frustrated!

This will accelerate the time needed to enroll in a plan, and provide our customers peace of mind.

(Your customer's problems or opportunities)

As a result:

That was
easy!

25% less customers will abandon the enrollment process, resulting in 2,000 new members each year, creating \$94,000 in monthly revenue.

New attitudes/behaviors, and the business results behind it)



TODAY'S TOPICS

The
Importance
of
Customer
Experience

What is a
Journey
Map?

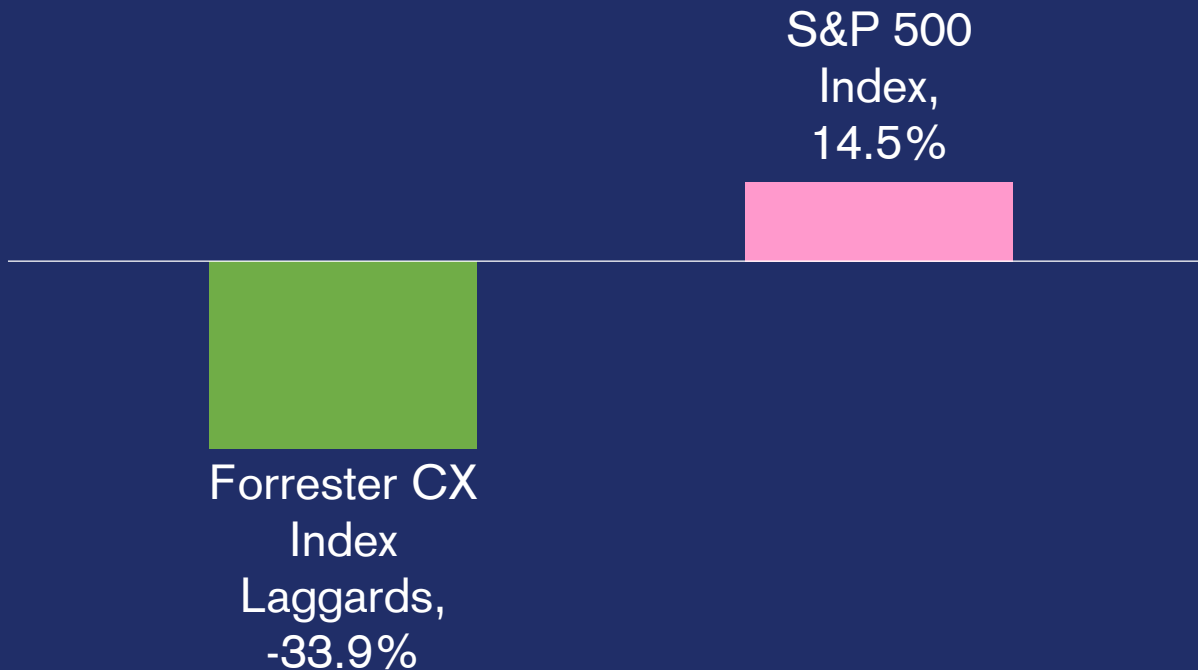
Leading a
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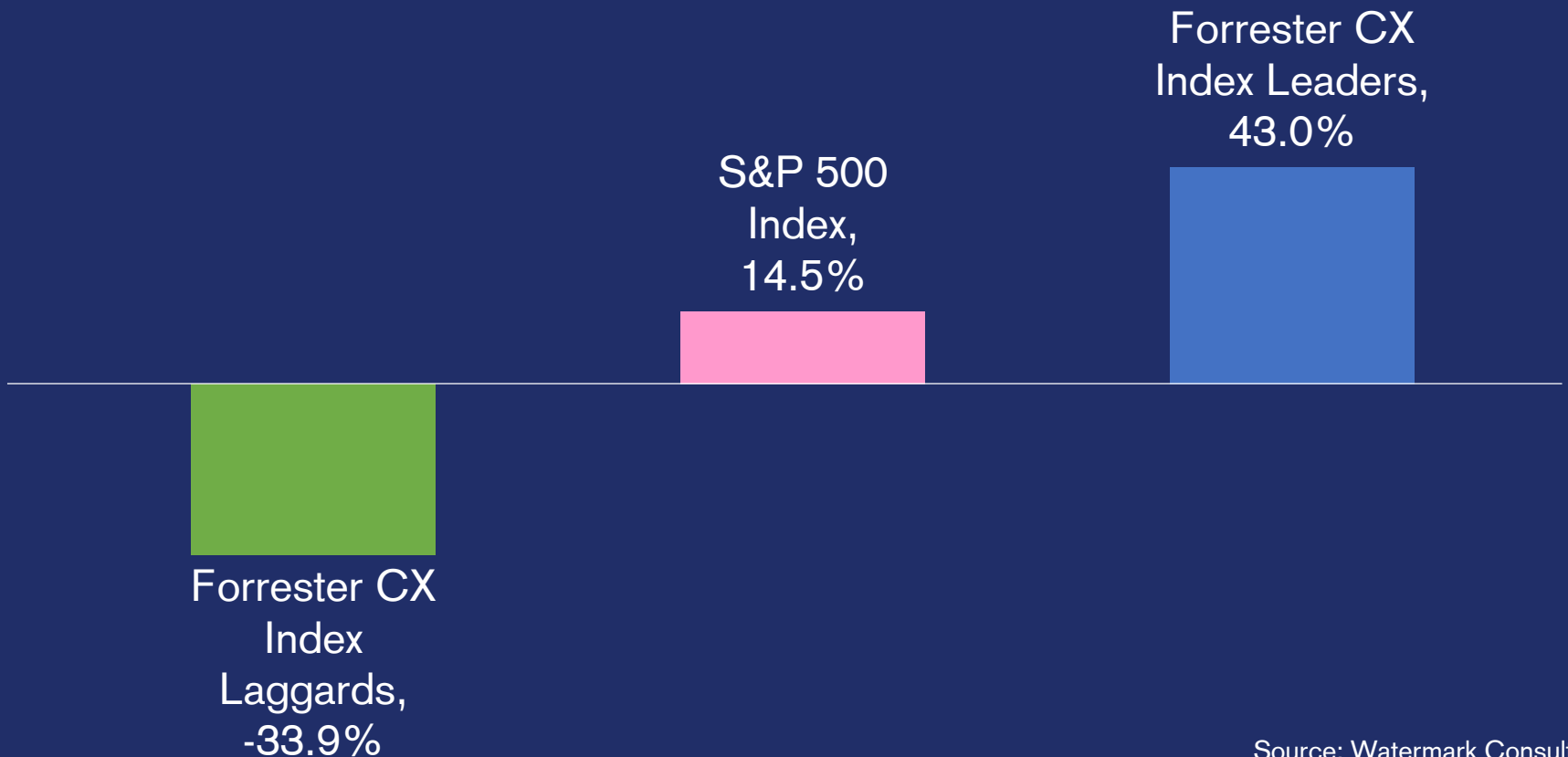
BUSINESS CASE FOR CUSTOMER EXPERIENCE

6-Year Stock Performance of CX Index Leaders vs. Laggards, 2007-2012



BUSINESS CASE FOR CUSTOMER EXPERIENCE

6-Year Stock Performance of CX Index Leaders vs. Laggards, 2007-2012



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through Maps

SUPPLIES

- Post-It Notes in six colors (recommend Office Depot Brand - <http://www.officedepot.com/a/products/843796/Office-Depot-Brand-Self-Stick-Notes/>)
- Sharpies for each person
- Colored dots
- Research-based Customer Journey Maps printed (preferably at 11x17)
- Design Canvas printed at 11x17
- Customer-Centric Change Charter printed at 11x17

May 6-9, 2014 • San Diego



contact center expo & conference

Thank you for attending
Please complete your session evaluation

REVOLUTIONIZE THE
CUSTOMER EXPERIENCE

