Customer Experience Design Method

BEST PRACTICES

- Don't try to drink from the fire hose. Only focus on one or two touchpoints at a time.

- Choose an Experience Design Team made up of people who are in the role that will be delivering the experience as well as a few other innovative, strategic, and respected individuals.

- Consider inviting a few customers to join the Experience Design Team or conduct a separate exercise with customers afterwards to validate your work.

- Use the facilitator guide at the end of this document to help your team in completing the Customer Experience Design exercise.

EXERCISE STEPS

1. Complete the Customer Experience Planning exercise to determine the target customers, build the touchpoint wheel, and identify success metrics.

2. Recruit an Experience Design team. Team could range from as little as five to as many as twenty individuals.

3. Break your team into small groups to complete the Customer Experience Design exercise.

4. Reconvene as a large group to share, collaborate, and vote on top ideas.

5. After the session, consolidate all ideas and establish final priority for each step of the design process.

6. Incorporate design into hiring, employee orientation, employee recognition, and performance review processes.

Customer Experience Design Planning

CUSTOMER SEGMENTS

Pick a group of customers based on industry (e.g., retail, commercial, distribution, or other industry-specific way), size, type of offering purchased, etc.

POTENTIAL CUSTOMER SEGMENTS TO DESIGN FOR

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ASK:

What customer segment do you want to design an experience for?

When considering your growth goals and objectives, is there a specific type of customer that is most important to WOW with an experience?

CUSTOMER: _____

TOUCHPOINTS

A touchpoint is any point of interaction that a customer has with your company's people, products, or services that could lead to a good, bad, or indifferent experience.

Use the touchpoint wheel at right to document all of the behavior-based points of interaction for the customer segment you defined.

For example, the touchpoints for a restaurant customer would include answering the phone,
greeting, table seating, server greeting, ordering, presenting the meal, checking back, dropping the check, and saying goodbye.
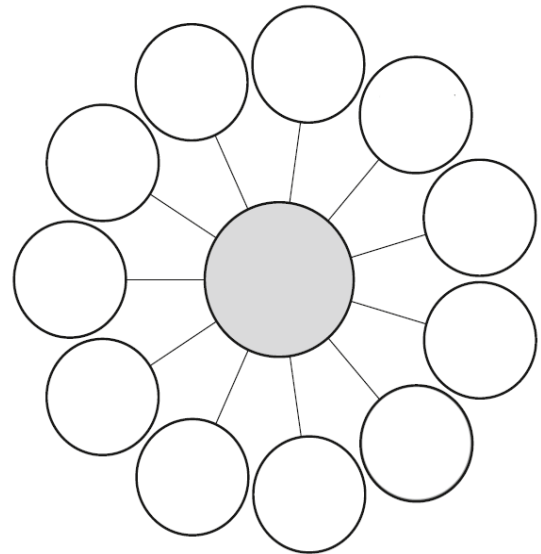
ASK:

For the customer segment you defined, what are the important touchpoints where employees interact with and have the opportunity to create a good if not memorable experience for customers?

What is the high-impact touchpoint you want to design the experience for?

TOUCHPOINT: _____

TOUCHPOINT WHEEL

SUCCESS METRICS

Use the Metrics that Matter Most chart as a starting point for determining the most important metrics for measuring success of the experience at your chosen touchpoint

ASK:

What are the ways you will measure the success of the experience delivered for customers?

METRICS:

1.

2.

3.

4.

5.

Metrics That Matter Most

Revenue Generating

1. Repeat business per customer
2. Average sale per customer
3. Profit margin
4. Customer retention
5. Number of referrals
6. Average sale per top 20% of customers
7. Cross-selling/up-selling
8. Hours billed (utilization
9. Inventory turns
10. Billing cycles
11. Conversion rates

Other _____
_____
_____

Cost Reducing

1. Employee turnover
2. Unwanted employee turnover
3. Quality issues
4. Product returns
5. Employee absenteeism
6. Legal expense
7. Marketing expense
8. Training expense
9. Safety issues
10. Time to fill a job
11. Employee theft

Other _____
_____
_____

Design the Customer Experience Exercise Handout

PART 1: Walk a Mile in the Customer's Shoes

Step 1: Explore Customer Desired Outcomes
Desired outcomes are what customers want as a result of doing business with your company and its products or service. Desired outcomes become the measure of value in the minds of customers. Document the desired outcomes that apply to the touchpoint you are designing.

Step 2: Uncover Experience Obstacles
List anything that could prohibit the ideal customer experience at a specific touchpoint; ways you might drop the ball at the touchpoint you picked above.

Step 3: Craft the Experience Mindset
A short statement (seven words or less) that will set the tone for how you want employees to think with respect to the customer experience you are designing.

Part 2: Outbehave the Competition

Step 4: Draft Job-specific Behaviors
List the behaviors (existing/new) that employees must do at the touchpoint. (Sometimes it is helpful to think about behaviors that employees should never do.)

Step 5: Uncover Above and Beyond Opportunities
List situations that employees should recognize and be prepared for in order to deliver a great experience ("wow" the customer).

Step 6: Prioritize Processes
List any existing/new key processes or tasks that must be followed to ensure a consistent experience.

Part 3: Measure and Manage the Experience

The customer experience design process enables you to document the necessary mindset and behaviors required to facilitate a consistently positive and often memorable experience. The experience that you design will be behavior-based, i.e., visible and measurable.

Once employees know the customer experience design and their role in acting it out, then it's time to kick-start reminders that will enable you to constantly communicate expectations and create a culture of accountability for living it. Remember the recipe for success: 1 percent training, 99 percent reminding.

What are three different ways you can remind the workforce about the importance of delivering your company's experience? Be specific.

FACILITATOR GUIDE

Use the talking points and thought-starter questions below to guide you and your team through each step of the Customer Experience Design process.

- **EXPLORING DESIRED OUTCOMES**

  - > At any given touchpoint, Desired Outcomes become a measure of value in the minds of your customers.

  - > If customers receive the Desired Outcome, the experience is more valuable. More valuable experiences have a positive influence on buying behaviors.

  - > *ASK:*

    - At this touchpoint, what do customers want to achieve?

    - How do customers want to feel at this touchpoint?

    - What do customers desire at this touchpoint?

    - Imagine you are the customer at this touchpoint. What outcome would make for a terrific experience for you?

- **UNCOVERING EXPERIENCE OBSTACLES**

  - > An obstacle may also be something that is out of your control. That is, you may not be able to prevent it; however, it is important to be aware of the obstacle as you can take action to minimize its impact.

  - > Obstacles may not be our fault, but because of resource constraints, process challenges, lack of training, or the wrong attitude, they hinder a consistently great customer experience.

  - > "It may not be your fault, but it is your problem to try and solve."

  - > *ASK:*

    - At this touchpoint, where have we dropped the ball in a way that led to a less than ideal experience for our customers?

    - Refer back to the Desired Outcomes. What prevents us from being able to deliver on our Customer Desired Outcomes?

- **CRAFTING THE EXPERIENCE MINDSET**

  - > The Experience Mindset is a short, simple statement that sets the tone for what customers want and what the company promises to deliver at the touchpoint. It supports the customer experience as the mantra that guides the actions employees do to deliver the branded experience at specific touchpoints.

  - > Think of it as the experience tagline.

- **DRAFTING JOB-SPECIFIC BEHAVIORS**

  - > Job-specific Behaviors are the actions that should be done 100 percent of the time at the chosen touchpoint.

> Some Job-specific Behaviors may be very basic (e.g., "Smile and say hello.") while others could be more complex (e.g., "Follow up after client meetings with detailed notes and action items").

> *ASK:*

- On your best day, what behaviors do you already do that lead to a great customer experience (be specific and describe what you do!)?

- What new behaviors should we consider doing at this touchpoint?

- At this touchpoint, what behaviors would help us to deliver on Desired Outcomes?

- At this touchpoint, what behavior would help us avoid Experience Obstacles?

- What can we do at this touchpoint to ensure we are delivering on our Experience Mindset?

> Beware of the Common Sense Trap—ask yourself, "Is this behavior common practice?"

> Identify potential Game Changers (behaviors that differentiate us from the competition and have a direct impact on revenue or cost-savings). *ASK:*

- Which behaviors would have the biggest impact if everyone delivered it, all of the time?

- **UNCOVERING ABOVE AND BEYOND OPPORTUNITIES**

> Above and Beyond Opportunities are situational behaviors that employees can do to deliver a great experience. Situational means there are circumstances where these behaviors are ideal to perform and others where it would make no sense at all. Situations can be dictated by a number of factors (who the customer is, the time of year, the weather outside, etc.).

> *ASK:*

- What are some ways we already deliver an exceptional experience for our customers at this touchpoint?

- At this touchpoint, what are some ways we could WOW our customers or do something extraordinary for our customers?

- **PRIORITIZING PROCESSES:**

> Processes should support employees and the physical environment by eliminating service barriers.

> Criteria for prioritization:

- Is the process already in place?

- Is it a new process?

- How complex is the process to put into place?