# Customer Experience Success

# 10 BIG IDEAS

Popular Articles by CustomerThink's Advisors

## customer THINK

E-Book

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This collection of articles was written by CustomerThink's Advisors – industry thought leaders who write columns exclusively for the community. They are the most popular Customer Experience articles published in the past year. To learn more, visit the [Advisors home page](#).

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# Is "Agile" the Key to Customer Experience Success?

Amanda Forshew

Agile entails frequent interventions and collaboration between business and IT groups and requires company-wide acceptance of a test-and-learn approach. Agile' as a methodology with its processes and practice has been around since 2001. It has been hugely influential and instrumental in software and technology development. What we are now witnessing is the spread of the thinking behind this approach and its practices into other industry sectors and functions. Agile is no longer a geeky concept of IT department or a procedure of the product development team.

I'm not from a software or technology background. So, I came to 'agile' late in its adoption. I first became aware of the term when helping a client shape the role that technology plays in their customer experience: if the refined, technology-enabled experience was really to be rooted in customer needs and expectations across their end to end journey. Our team was equally made up of technology and IT members as it was customer and insight, hence the question of an agile approach, arose.

A Freeform Dynamics survey, commissioned by CA Technologies, comprising senior business and IT executives found that the top performing 25% who they named the "Masters" have adopted the key principles of agility. The survey highlighted that 91% of these Masters are implementing agile practices widely and deeply across their organization, not just in the IT and technology space.

What's perhaps most interesting is that these companies are demonstrating superior business results in the order of 70% higher profit growth and 50% higher revenue growth.

## Is CX Agile?

Let's now focus on Customer Experience – much more in my space! Many of us have been saying that there are fundamental problems with CX. Experiences are not improving for customers despite a burgeoning CX industry, many more people are becoming 'expert' and more money is being spent on 'solutions'. Some believe that Customer Experience will become CRM Mark 2 – i.e. Being the next big thing, being the target for technology vendors promising the holy grail yet business being disappointed with the results. Look at Bob Thompson's great piece published on February 7th and the commentary and discussions that followed – 93% of Customer Experience Initiatives are Failing…

According to a recently published White Paper by West Monroe Partners, 71% of CX leaders expect greater agility to translate into improved customer experiences. Their belief is that:

> "at the heart of business agility is the customer experience. And it is the customer experience that will drive organisations forward and guide them to adapt (or fail)."

In theory, an agile approach should be perfect for CX. My fear is that taken literally, it could make matters worse. Many companies have been busy trying to 'close the loop', taking feedback from customers about what's not working and fixing problems. There hasn't been a focus on **innovation and improvements** that will really drive the customer experience forward.

Agile Customer Experience means more than quick fixes. Doing the quick and easy things to silence those customers who choose to give their feedback or complain, may not have a great impact on or value for the

customer, in the long run. If, however, an agile approach to CX is employed to develop and introduce small changes that combined have cumulative big impact for customers, then it could be what is needed.

## Moving at the speed of customer expectations

An agile business mindset or strategy would help businesses move towards greater customer centricity if done well; i.e. If it focuses on customer intelligence rather than quick wins, at its heart. Perhaps there is an argument for such an approach instead of a huge, all-encompassing customer transformation programme.

Agile would mean that Customer Experience change or improvements are easier to implement, benefits can be seen more quickly and the process is more inclusive. It would also bring a broader range of people from around the business on the journey through day to day agile team-based working.

Customer Experience for me has always been about the connection between customer, the company represented by employees and execution. I think taking a lesson from the agile 'manifesto' could help many businesses overcome their current roadblocks to successful CX. Roadblocks include a lack of tangible benefits, having clear and broad ownership, inability to operationalise data, departmental detachment, in order to deliver results for customers, at pace.

Essentially five attributes of Agile Customer Experience should be:

- Continuous customer listening, artful analysis and speedy insight sharing
- Momentum through small, frequent improvements vs. larger infrequent ones
- Only initiatives that deliver perceived value for customer
- Collaborative cross-department teamwork and accountability
- Curiosity – a process of persistent questioning, building and learning

## An example of Agile Customer Experience

Paypal had 85 bottlenecks in their development process and were finding that "it was really hard to get work done" in improving and delivering the best experience for customers. This was not only frustrating for customers as the experience was very fragmented but for employees too.

PayPal brought together their product and tech teams and aligned their goals around the customer in a work stream known as *customer driven innovation.* These teams now jointly own the customer experience (which includes product, price and all elements of the customer proposition) and jointly care about the quality of the delivered customer experience.

What's more, PayPal projects are not seen as one-offs — when the project or improvement is delivered, the box is ticked and the team moves on to the next initiative. When PayPal have launched an improvement that has impacted the customer experience, they begin thinking about the next iteration to keep surpassing customer expectations. In the 18 months prior to these changes they launched 3 new products; in the 18 months after, they rolled out 58 new products or features that benefited customers.

## Creating Agile Customer Experience

How can companies go about creating Agile Customer Experience?

1.  Agile **customer listening**

Oftentimes, VoC is owned by one part of the business and focuses on getting feedback and measurement; customer or market research is in another. There needs to be one holistic, interpreted and actioned view of the customer. All sources should be brought together to serve decision making, prioritisation and plans.

2.  Agile **governance & decision-making**

A cross functional customer board convenes frequently (at least weekly) in a data-driven, immersive, fast-paced, decision-making environment, as the filter for all things customer. Not a reporting meeting but a sharing and decision-making forum with people empowered to make changes and committed to cascade down to their teams and their sphere of influence.

3.  Agile **Prioritisation**

Armed with an on-going steam of data and information about what matters most to customers, companies can make important trade-offs and prioritisation decisions. This way the number of 'quick wins' or fixes are kept to a minimum, unless they truly add value to the experience for the customer and meet or exceed their expectations.

4.  Agile **planning and measurement**

A flexible roadmap – an overall but adaptable number of initiatives that will make a difference to the customer experience but within a plan that can respond to changes as they happen. There are short-term targets and clear customer benefits to each of the initiatives.

Successful agility relies upon continuous improvement. The plan or roadmap needs to balance quick impact initiatives and those which can genuinely be classified as innovative.

5.  Agile **execution**

Execution of initiatives or CX improvements need to be simple, fast, focused and iterative. There should be a mind-set of testing and piloting e.g. ideas may not be 80% right from the start but with in a series of 'repeatable sprints', they will meet customer expectations and needs.

We have a responsibility to constantly question what could be better to continually improve. As Albert Einstein said: "Learn from yesterday, live for today, hope for tomorrow. The important thing is not to stop questioning." This is the spirit of Agile Customer Experience.

## Do you have a vision for Agile Customer Experience?

Are you tangibly delivering value to the customer in your CX efforts? If not, maybe agile should be a priority?

If CX is about meeting and exceeding customer expectations at every touch point over time and agile is about better, speedier execution, then CX and agile could be a business marriage made in customer heaven.

Agile Customer Experience is about *being* agile as much as *doing* agile. Agile, along with a connected and customer centric organisation and a rigorous and deliberate focus on customer value, will lead to **Smiling Companies, Happy Customers**.

Note: "Agile Customer Experience" in this article does not represent "Agile CX", a trademark of David Fish.



**Amanda Forshew**
Customer Alignment

Amanda writes and shares Thought Leadership at Customer Alignment, where she draws on her 15 years of coaching, guiding, mentoring and consulting for clients in various sectors and sizes around the world. Championing the customer within the organisation for commercial & customer success, is her passion. She helps establish organisations understand how to connect to customers & find ways to align their expectations with the culture & capability of the organisation. The goal in mind: Smiling Companies, Happy Customers. Amanda will also be a regular featured columnist for Customer Think in 2018.

# Marketing's Role in Employee & Customer Experience Journeys

**Lynn Hunsaker**

Is your Marketing department aligned with customer experience and employee experience? The necessity and logic of doing this was highlighted in a recent presentation by Hootsuite's Vice President of Customer, Kirsty Traill. She pointed out that Marketing Communications is unfortunately the typical focus of customer journey maps and customer-centric marketing.

Her observations are in accordance with the first half of this six-part series which also pointed out that MarCom-focus for customer-centric marketing is extremely short-sighted in what's needed by your company. It short-changes marketing's impact.

Hootsuite takes a holistic view of "brand experience" by applying customer-centric research and thinking to each phase of the **end-to-end customer experience and employee experience** journey maps — for use by all groups within Marketing and beyond. Brand integrity relies upon both employees' and customers' perceptions. It also relies on the company's fulfillment of their needs. Marketing plays a significant role in understanding, communicating and assuring these needs.

"We recognize the importance of employee engagement in driving the customer experience," said Kirsty. "Marketing touches every part of the employee journey and is a key part of driving a truly customer-centric culture, starting with recruiting and whether the public's image of our employer brand is likely to attract high-caliber talent."

The journey team at Hootsuite includes Marketing, Sales and Customer Success representatives. This allows them to look through different lenses. Their work has developed an overarching messaging hierarchy informed by customer journey mapping, and grounded in customer needs. "It's an overall guide of how customers talk about the category," explained Kirsty. "It describes how customers and employees think about each phase of their journeys, and how they talk about their needs. It provides vocabulary for consistent messaging to each of four core customer personas and to employees."

Marketing decisions are guided by a table of customer insights available for each journey stage, showing which voice-of-customer insights inform each stage and who owns it. Julie Garrah, Customer Experience Manager on Kirsty's team at Hootsuite, explained: "We emphasize closing-the-loop in communicating what action we're taking. This drives improvement in scores. We send customers a closing-the-loop email on a six-month cadence, sharing what we're doing."

*The image below describes my interpretation. Green phrasing is my suggestion to foster outside-in thinking.*
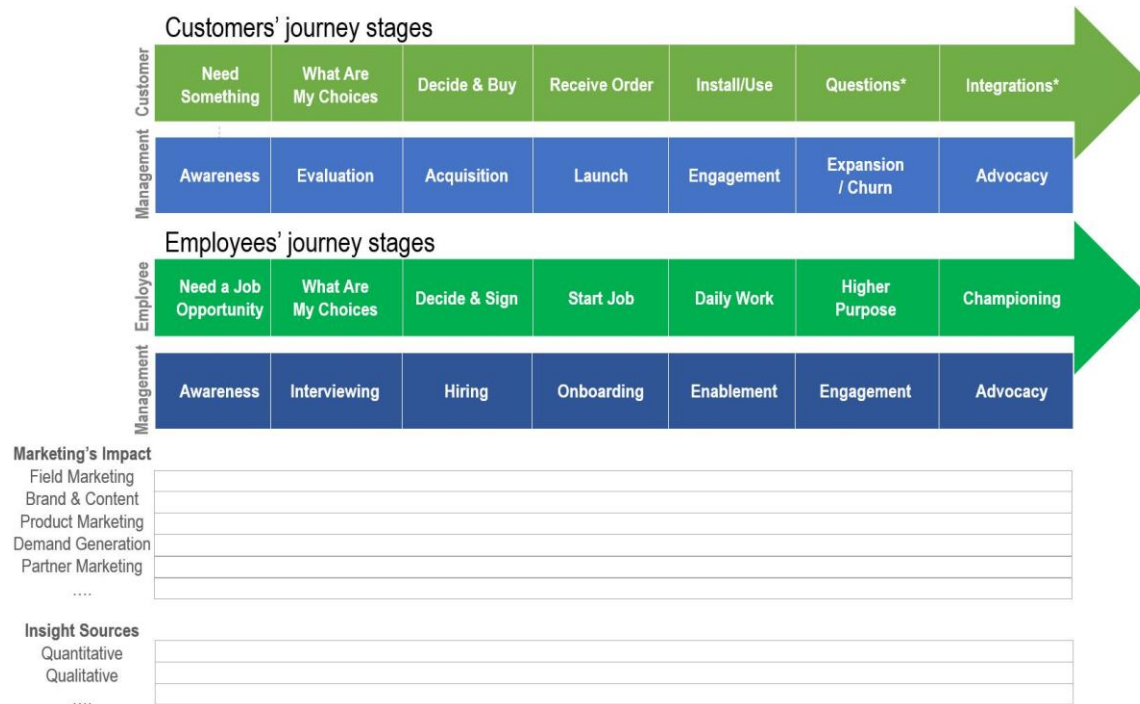


## Research for Marketing Across the Customer Experience Journey

Hootsuite has defined four core personas and developed a customer journey map for each persona. (I've found it best to identify natural customer segments by looking for patterns across qualitative data.) Hootsuite builds a deep understanding of each segment's journey stages by answering these questions:

- **Need Something:** How does a customer become aware of the need for what your category represents, how would they describe the need in their own words, what is it that triggers the activation of that customer need?
- **What are My Choices**: Which other companies are in your customers' consideration set, where are they finding information to make a decision in the category, what is their evaluation criteria?
- **Decide & Buy**: What information are they looking for to make their decision, what is it that locks them in to your product versus your competition's, do they talk to anyone, what does your purchase process look like, how long does it take, how easy was it for customers relative to their expectations?
- **Receive Order**: What do they need to get started, where do they find information during this stage?
- **Install / Use**: How do customers use your product/service, how do they define the value, how do you deliver upon that value, how do you reinforce that they've made the right decision?

- **Questions / Moments of Truth**: Which touch-points triggered repeat purchase, upgrade or expansion; where did you fail to deliver on their expectations; what caused customers to cancel, suspend, return, leave, what were the triggers; what information do they need and in what format?
- **Integrations**: Which touch-points turn fans into loyal fans and advocates, what is the customers' context for usage of your product, what are their interactions with your people, what is their connection with your brand?

**\*Questions / Moments of Truth**: Researching the "moments of truth" stage can be a difficult process to go through, but Kirsty explained: "This information is rich and can be used in very productive ways for improving customer experience as well as your marketing mix and marketing touch-points."

**\*Integrations**: I've found that integrations might be the most significant part of the journey as it answers "what is the customer trying to get done . . . with or by whom, under what circumstances, in combination with what processes or hardware/software?" This context can be a game-changer for up-leveling your marketing, product development, and operations.

## Research & Actions for Marketing Across the Employee Experience Journey

Hootsuite applies customer experience insights to all stages of the employee experience journey:

- **Need a Job Opportunity / What are My Choices:** Does your Careers web page paint the image of a customer-centric company, how employees are portraying you on LinkedIn and GlassDoor, is your employer brand aligned with your corporate brand and customer-focus?
- **Decide & Sign / Start Job:** Educate every new employee on buyer personas and user personas in every team and department, show videos from customers explaining what they use and like, provide pocket guide with customer needs and value proposition, explain company standards to new hires so they understand how important customer-focus is and how their specific role affects customer experience.
- **Daily Work:** Empower everyone in the company to address customer issues since it's impossible for your Customer Success team to manage every touch-point customers have with your company, role-based training, create a central repository of customer information and unified customer profile across the journey, design your tech stack to integrate the fewest systems necessary to house customer data for a comprehensive story of individual customers.
- **Higher Purpose:** Make "customer love" visible through stories shared with employees, display your Customer Support vision, encourage employees to participate in shadowing, ride-alongs, and capturing customer quotes.
- **Championing:** Encourage brand spirit through corporate apparel and swag, empower employees to "share love" through social media, arrange for people from development to shadow Customer Support and Sales Enablement to sit in on sales calls, invite Product Marketing and Vertical Marketing teams to attend customer events to see how customers are interacting and engaging with content.

Hootsuite studies a flow of qualitative data from marketing touch-points about what customers want and need. By gaining a deeper understanding of how customers are thinking and feeling about information at each stage in their journey, the company has also gained appreciation for how the touch-points interact with one another.

These insights re-orient employees' outlooks. They break down traditional silo mentality. The goal is to become a more customer-centric organization by driving behavior in doing what's best for the customer as the way to drive business growth.

*Note: Kirsty Traill is a member of the ClearAction Value Exchange's Executive Leadership Board. She presented this case study in one of the Exchange's Webcast ConversationsTM, a guided opportunity for Exchange members to rapidly personalize new perspectives to their work situations for same-day actionability.*

*This article is fourth of a six-part series as an exclusive [CustomerThink Advisors](#) column: How Customer-Centered Marketing Steps Up Your Performance & Influence.*

**Lynn Hunsaker**
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# Why McKinsey Says Link the Customer Experience to Value

### Gautam Mahajan

> *Many customer-experience transformations stall because leaders can't show how these efforts create value. Patiently building a business case can fund them, secure buy-in, and build momentum.*
> — McKinsey

Joel Maynes and Alex Rawson**,** Partner at McKinsey go on to say:

- "The road to failed customer-experience programs is paved with good intentions. Executives are quick to see the end-game benefits of a customer-centric strategy: more satisfied customers, increased loyalty, a lower cost to serve, and more engaged employees. But they often fail to understand clearly what a superior customer experience is worth and exactly how it will generate value."

- "Without a quantified link to value and a sound business case, such efforts often can't show early gains, build momentum among functional executives, and earn a seat at the strategy table. They stall before they ever really get going. When establishing a link to value is done well, it provides a clear view of what matters to customers, where to focus, and how to keep the customer experience high on the list of strategic priorities."

Lyn Hunsaker in [CustomerThink](#) said Customer experience value creation occurs when you empower customers to achieve their goals with greater satisfaction in a win-win approach

I said in CustomerThink, CX is one aspect of creating value. But in the case of a CVA (Customer Value Added) measurement, the questions are asked of the decision maker, not the user who has been in the transaction. The decision maker may not have had transactional experience, but he has an impression of the difference between competing offers. And the decision maker makes the decision.

Michael Hinshaw in CMO Magazine states for the past several years, improving customer experience (CX) has been rightfully viewed as one of the most important things any organization can do to drive value. And Jim Carrass of Customer Value Creation International (CustomerValueCreation.org) sent a link to me about Customer Value Creation, making me think about Customer Value (CV).

- CV tells us why people buy, and why they do not buy from our company
- Creating better Customer Value will increase your market share. Delivering a great experience should give you a bigger market share. Is your company getting a larger market share with the experience it is delivering? If not, ask why not?
- Customer Value tells you how to create value faster/better than competitors, a core idea that is missing in CX. You cannot just increase CX for your customers. Your company's CX has to be better than the CX competition provides to its customers
- Customer Value gives you implied weights of what is important to the Customer
- How companies are able to get out in front of their competitors and stay there
- Customer Value is inclusive. It includes CX, Customer success, Customer effort, customer journey, Value Proposition and so on. It includes cost, benefits, experience, emotions. Great CX enhances Customer Value

Sometimes, we do not have an experience with a product or service, but we still buy it on the basis of the value it delivers. Often we do not notice the experience because it remains embedded. Take salt, we do not directly experience it. We experience it when it is missing, or in excess.

The goal of many organisations is to create value for the customer. Service-dominant logic's specific goal is to co-create value for the customer. The goal of the Customer Success Association is to Create Customer Value. Customer Experience impacts customer value and so is very important. Customer experience seeks to increase value through every interaction. Annette Franz, Founder/CEO, CX Journey Inc. states the value that CXPA offers resides in both education and networking.

CXPA says that companies recognize the importance of value as a key ingredient in building and maintaining customer loyalty. CXPA does not mention experience as a key benefit to members.

## CX is also a key ingredient in creating Customer Value

Let me give you an example of a pesticide company which had excellent satisfaction scores, and were working on improved customer experience. Over two years, while scores increased, market share and sales did not increase. They then embarked on a Customer Value creation program and started a courtesy system (where their employees started to be courteous to each other in the office). Along with the courtesy system, they started customer circles for frontline people to align them to the customer and deliver greater value. They also started an evening meeting to pick up and discuss issues that customers faced during the day, opportunities with customers and possible new accounts. They found that those people who were setting up appointments for the field staff were not noting down complete addresses, and were haphazard about ensuring that field staff did not have to criss-cross the town to get from one customer to another.

After 3 months, they found sales call per field person had increased from 3 per day to 5 per day; sales per salesperson had increased by 30%; market share had gone up because of new acquisitions; on time support had improved. All this because of a customer value focus on customers, and starting customer circles for frontline people. The customer value-added score before and after the 3 month period had improved considerably. The satisfaction score had improved marginally because of on-time service improvement.

This is exactly what Mckinsey had suggested at the beginning of this article would happen with a greater focus on customers: more satisfied customers, increased loyalty, a lower cost to serve, and more engaged employees.

## What should business people and companies do?

- Continue to deliver great experience and satisfaction to your Customers
- Give a great experience to your employees and partners. Recognise Customer Experience is one aspect of Customer Value
- Recognise that this is not enough. You have to be better than your competition — You must deliver more customer value to your customers than your competition delivers to its customers.
- Remember relative Customer Value Added relates to business results. Customer Value includes the image of the company, the company people, the relationship, the product, and the costs (both price and non-price)



**Gautam Mahajan**
Customer Value Foundation

Gautam Mahajan, President of Customer Value Foundation is the leading global leader in Customer Value Management. Mr Mahajan worked for a Fortune 50 company in the USA for 17 years and had hand-on experience in consulting, training of leaders, professionals, managers and CEOs from numerous MNCs and local conglomerates like Tata, Birla and Godrej groups. He is also the author of widely acclaimed books "Customer Value Investment: Formula for Sustained Business Success" and "Total Customer Value Management: Transforming Business Thinking." He is Founder Editor of the Journal of Creating Value (jcv.sagepub.com) and runs the global conference on Creating Value (https://goo.gl/4f56PX).

# Connected Listening: 3 Tips to Meet the CX Challenges of Omni-Channel Communication

## Nancy Porte

It's essential CX practice today to offer customers a range of channels through which they can interact with you. But adding new channels is only half the battle. It's the CX team's responsibility to coordinate them, too. At the B2B technology company for which I work, we call it connected listening.

For many companies, adding channels means adding silos to an already siloed organization. Lack of coordination across those channels can defeat the purpose and cause frustration for customers, who don't care that your call center and web experience team operate separately from one another, or that your mobile app development team rarely communicates with your store or branch network.

CX organizations are uniquely positioned and skilled to ensure that organizations are offering customers great omni-channel experiences. Here are some guidelines to make the most of the omni-channel boom.

## 1. Make sure data is consistent across channels.

When my company built our CX organization a few years ago, we organized it across departmental lines. From the executive steering committee to the CX Catalyst workgroup, we made sure we had representation from each department—sales, service, marketing, support, product development, web development—focused on CX priorities.

What's changed in the intervening years is the proliferation of channels. Customers interact with us on mobile apps, on Facebook, on our community portal page. Each of those channels is owned by a different part of the organization.

Our digital team manages customer-initiated feedback on our website; the contact center manages online and phone requests; our product and IT teams share primary responsibility for managing our online community. We found this structure made it increasingly difficult to get a clear view of customer experience across all these varied touchpoints. So, we took an inventory of the data we already had across channels.

This exercise resulted in a couple of interesting findings. First, we found different teams were using different scorecards. That is, the metric used to measure customer satisfaction wasn't consistent across channels. Some were using Overall Satisfaction. Others were using Net Promoter Scores (NPS), etc. This resulted in a fractured view of our customers' experience with us. Another finding and, arguably, the most critical, was that we were measuring channel data rather than looking at what the customer was trying to accomplish across those channels – and whether the customer journey across channels was successful, easy or frustrating.

So, we made some changes. We started by mapping the tasks that customers were attempting to complete. Then we looked at where and how we were gathering customer feedback and how we were combining the feedback to create insights. This created another dimension for our journey maps as we visualized the same gaps that our customers were feeling. It started our CX organization on the path to using omni-channel data to obtain customer insights that truly put us in the customer's shoes. As a result, our teams have expanded the gathering of customer feedback to include key points across the customer journey while standardizing the language of customer satisfaction.

## 2. Use data to drive CX program design.

Once metrics are consistent and focused on customer outcomes, Voice of the Customer (VoC) data from surveys, digital feedback and speech and text analytics technology can help you spot the source of CX problems. Are customer complaints specific to your entire organization? Is there something consistent across a single team? Or is it just a single agent? Essentially, VoC provides the "why" behind the "what." Used wisely in a connected listening approach, VoC data collected from one channel can be the foundation for improvements in another one.

VoC data showed my CX organization that customers didn't want a new customer support portal we were considering designing for opening a new service request. They saw our existing online customer community a perfect place for the ticketing system.

In response, we have a design project currently in development to integrate our customer support ticketing system, knowledge base and online community. Originally, the new ticketing system portal would have required customers to log in to a separate site to request support. However, since there were discussion threads, documents and other resources already in the online community, it made sense that our customers much preferred having the ticketing system there.

In this way, we've looked at the customer outcome—entering and tracking a customer support issue—and designed a cross-channel solution that makes the process easier for them and better streamlined operationally for us.

## 3. Use data to find the 'secret sauce.'

VoC tools can show that certain self-service steps that you think necessary are actually getting in the way of customers, or that additional steps or instructions are needed to create a smooth self-service experience. You can also use VoC findings from self-service channels to improve agent training in the contact center, and to provide agents with a better knowledge set when calls escalate to the contact center from self-service channels.

In addition to identifying training and coaching opportunities, we are using VoC data from our various channels to identify segments of customers and how their satisfaction scores compare with one another. Then we look at operational data for each group to try to identify the "secret sauce"—what made their experience better? Were resolution times lower? Were service representatives handling issues differently? Or were their issues less complex to begin with? If they had a complex request, how many channels were involved in solving it, and why? Was it a matter of customer choice or customer expediency to switch from one channel to another to accomplish their goal?

We've also found that simply providing opportunities for various teams to meet regularly on specific customer interactions helps uncover new ways to serve customers better that might not even have been on the agenda for the meeting or that seem unrelated. It can be something as simple as figuring out that if another team were involved, you could get a vital piece of information before serving the customer and do it faster and better.

You can also ensure that messaging is consistent and branding standards are enforced across channels. The last thing you want to do is confuse or frustrate customers by offering a special discount on one channel but not on others, or create a graphic or message that looks or sounds as if it comes from a different company.

## Focus on the outcome, not the channel

Data comes from your website, your mobile apps, your call center, your stores. Traditionally, different teams manage that feedback and act on it separately within their own channel or department. What's missing is a view of the big picture. For most companies, the CX team is perfectly positioned to provide it … with a little digging.

I co-presented a webinar on this topic recently with Diane Magers, CEO of the Customer Experience Professionals Association (CXPA). Diane firmly agrees that data can help you see if you are on the right track in your CX program design. "Data can help you see the rainy days and the wrenches and the things that get in way," she said. "But it also can help you build the customer story across each channel—and get greater business value from them."

**Nancy Porte**
Verint

Nancy Porte is the Vice President of Global Customer Experience for Verint. With a background in operations management, her passion is developing differentiated customer experiences through cross-functional collaboration and employee engagement. She is a Certified Customer Experience Professional (CCXP), regular contributor to the Verint blog and frequent speaker at industry conferences.

# Qantas Interruptus: How to Ruin the Customer Journey

**Bill Price**

We all tend to use the tagline "analyze the customer journey" to discover opportunities to improve the customer experience, since it's clear that companies need to make it easier for their customers[1], anticipate snags and offer solutions[2], and figure out how to delight them.

My wife and I were very excited to travel "down under" to Melbourne and Sydney, Australia last week, her 1st trip there, where I worked with my co-author and business colleague David Jaffe. I booked us in Business Class on Qantas, the "national airlines" of Australia with a 4-Star rating according to SkyTrax[3] and the 4th "most punctual" airline in the world[4].

However, for our customer journey Qantas failed in so many ways (22-hour delay leaving San Francisco, canceled flight, lost roller bag wheel, down-graded to Economy, no proactive alerts, no surveys to get feedback, no apologies) that its excellent in-flight service could not recover.

Here's a quick view of our customer journey shown in 26 steps, with 10 = best and 0 = horrible (see the spreadsheet describing each step in the footnotes[5]). As you can it started out fine, fell already in steps 2 and 5 when we discovered that our 14-hour flight to Melbourne was delayed by 1, then 2, and finally 3.5 hours until 1.45am when the Qantas Captain told us at the gate that the crew had timed out, and the mechanics still hadn't fixed the problem, so the flight would be delayed until sometime the next day.



It only got worse in steps 6-9: After another 15-minute delay the gate staff, who worked for another airline, told the 245 passengers to return to the check-in counter for further instructions. No one appeared for 30 minutes while everyone lined up grumpily, with no special treatment for Business Class. By 3 am word spread that the new departure time would be 6 pm, but no one handed out the form – we had to pick it up in person when we reached the front of the queues. When I reached the head of one of the lines the same non-Qantas staff told the rest of us that they had run out of hotel rooms so we were on our own! Fortunately, I called my favorite hotelier Hyatt and they came through and we helped another stranded couple (from Tasmania) to book a room there, and wound up in San Francisco for the night.
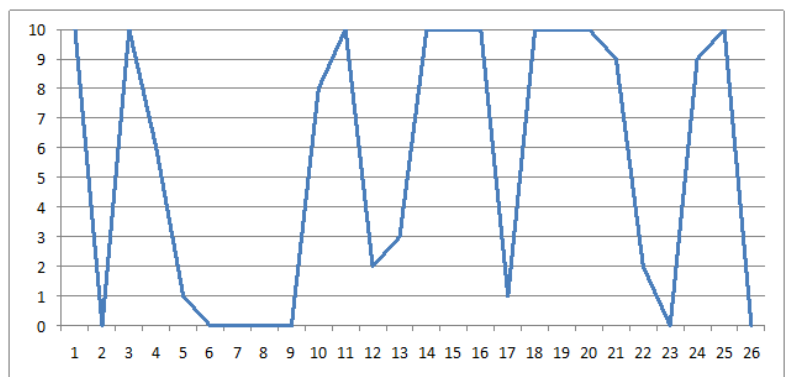
We returned to check into that rescheduled flight, relaxed in the lounge, went to the gate, and discovered that we were delayed again, another 1, then 2 hours (step 12). When we finally boarded, the same crew that had timed out 22 hours earlier greeted us, and treated us, with warmth and excellent service (step 14).

The problems continued when we finally landed in Australia: A canceled connection in Melbourne that resulted in a well-played rebooking, lost wheel on my roller bag, down-graded to Economy in our last flight (step 23: "An earlier flight was canceled and a passenger with higher status was moved into your seat." Incredible!!), and interminable waits on hold to reach customer service or reservations (I was told my every Qantas employee that the call center had terrible service levels; the Qantas IVR prompted me for my Qantas frequent flyer number but since I didn't have one, having used my Alaska Gold number, and did not ask if we booked Business Class the way that Emirates and other premier airlines do, we were dumped into the "general" queue). To add insult to injury, it's been a week and Qantas has not said a word about this botched experience (the final step 26).

What went wrong, and what could have Qantas have done to "make it right?" Seems to me that Qantas needed to have a "disaster recovery plan" for cases like this (broken aircraft in an airport with no back up, seconded staff from another company) with a very high level of communication and remedies to offer all passengers, especially Business Class, even if they were not Qantas frequent flyers. If Qantas has such a plan, it surely didn't work.

Some might argue that Qantas redeemed itself with a superb in-flight experience (the "service recovery" argument), but we lost a precious day in Australia. Others could calculate a poor -1 NPS and average the 26 steps to produce an overall score of 5.4, also poor. As I pointed out in an earlier column called "Get Rid of Average Thinking: Make Every Experience Count"[6] it's much more relevant to study the outliers, in this case, the 7 steps where Qantas scored a goose egg 0.

Boiling down our customer experience, with an emphasis on these 7 zero scores, and applying the lessons and frameworks in our two books, we see that Qantas needed to:

**Be proactive.** We were held at the gate for more than four hours with the board showing later and later departure times *between 9pm and 1.30am!* with kids crying, families sleeping, elderly passengers hobbling around, and mobile phone batteries draining away (an SFO airport issue since there were very few plugs). At no time were we advised to return to the two lounges, or find food, or charge our devices on power strips that they could have provided.

**Listen and act, and don't ask me about my effort.** Two of the Qantas gate agents handed me business cards with a customer service feedback line to register our upsetting experiences, but as I have written two years ago in "Don't ask, know!" Qantas already had most, if not all of the customer journey mistakes that it made (delays, down-grades, lost wheels, IVR hold time, etc.) so it could easily extract the data and figure out how to intervene, offer an alternative, apologize, and in other ways try to right the ship. Big Data and predictive analytics can be deployed to produce customer effort scores (CES), NPS (as I showed earlier, a -1), and satisfaction levels.

**Make it easy for me.** We were all kept in the dark about the need to find our own hotel rooms. Later when we queued up for instructions and rooms, there was no announcement about what to expect nor when the rooms ran out. A couple next to us from Tasmania had not called around for a room so I called Hyatt back and found one for them, too, and the four of us headed to San Francisco for what our UK colleague Peter Massey calls "sleep fast".

**Value me.** Some of were very frequent flyers on Qantas or partner airlines, but the staff handling the gate and the eventual vouchers never separated passengers into Business Class or more manageable queues. There have been no acknowledgments of the problems that we faced, no apologies, no IVR prompt for Business Class travel, and no compensation which all clearly conveyed "We don't care".

**Empower its crew and customer service team, and don't make me have to navigate the organization.** In addition to the delays and lack of communication, I had to call Qantas to reschedule our connection (that was on a separate ticket). At 4 am I suffered through a 35-minute call to Qantas' reservations line including 11 minutes before I was connected, and three holds while the agent had to check with the re-booking desk. This should have been a 3-minute call if the IVR had prompted for Business Class in addition to Qantas frequent flyer number, and if the agent was empowered to make the changes!

After this series of misadventures my wife told me "Let's not fly Qantas again." Not only did I tell >50 participants in our LimeBridge business events in Sydney and Melbourne about our experiences, and I'm sure that they've told others, but I then changed our planned final flight from Melbourne to Singapore from Qantas to Emirates.

Notes:

[1] We introduced "You make it easy for me" in our 2nd book *your customer rules! delivering the me2b experiences that today's customers demand* (Wiley/Jossey-Bass 2015). Here are the 7 Customer Needs that Lead to a Winning "Me2B" Culture; each Need breaks down into a total of 39 Sub-Needs.

1. "You know me, you remember me"
2. "You give me choices"
3. "You make it easy for me"
4. "You value me"
5. "You trust me"
6. "You surprise me with stuff that I can't imagine"
7. "You help me better, you help me do more"

[2] We profiled the importance for companies to "Be proactive" in our 1st book *the best service is no service: how to liberate your customers from customer service, keep them happy, and control costs* Bill Price & David Jaffe (Wiley 2008). Based partly on my years as Amazon's 1st WW VP of Customer Service, but also on "Best Service" providers around the world who have made it easier for their customers to do business with them, we proposed 7 Drivers that start with "Challenge demand for service":

1. "Eliminate dumb contacts"
2. "Create engaging self-service"
3. "Be proactive"
4. "Make it really easy to contact your company"
5. "Own the actions across the company"
6. "Listen and act"
7. "Deliver great service experiences"

[3] https://skytraxratings.com/airlines/qantas-rating, accessed 14 October 2018

[4] http://www.traveller.com.au/the-worlds-most-and-least-punctual-airlines-most-ontime-airlines-for-2017-h0ffdg, accessed 14 October 2018

[5] Spreadsheet behind the 26-step customer journey:

| | |
|---|---|
| 1 Booking (on www.qantas.com) | 10 |
| 2 Pre-flight confirmations and advisory, Qantas (none) | 0 |
| 3 Airport check in, 1st leg Seattle to San Francisco on Alaska Airlines | 10 |
| 4 Transfer to 2nd leg San Francisco to Melbourne on Qantas | 6 |
| 5 Lounge in San Francisco (not directed to Cathay Pacific Club) | 1 |
| 6 Boarding 2nd leg San Francisco to Melbourne (>3 hours delayed) | 0 |
| 7 Updates during delay, 1st try to leave San Francisco | 0 |
| 8 Support to find hotel and provide vouchers after 1st try delay | 0 |
| 9 Help from Qantas customer service to re-book connection | 0 |
| 10 Airport check in, 2nd try leaving San Francisco | 8 |
| 11 Lounge in San Francisco | 10 |
| 12 Updates during delay, 2nd try to leave San Francisco (none) | 2 |
| 13 Boarding 2nd try San Francisco to Melbourne (no line for Business) | 3 |
| 14 In-flight experience San Francisco to Melbourne | 10 |
| 15 Customs & baggage claim, Melbourne | 10 |
| 16 Transfer to connection Melbourne to Sydney | 10 |
| 17 Check-in for Sydney flight (cancelled for some reason) | 1 |
| 18 Re-booking after connection flight canceled | 10 |
| 19 Lounge in Melbourne | 10 |
| 20 Boarding Melbourne to Sydney | 10 |
| 21 In-flight experience Melbourne to Sydney | 9 |
| 22 Baggage claim in Sydney (lost wheel) | 2 |
| 23 Check-in for return flight to Melbourne (down graded) | 0 |
| 24 In-flight experience Sydney to Melbourne | 9 |
| 25 Baggage claim in Melbourne | 10 |
| 26 Follow up by Qantas (none) | 0 |

[6]http://customerthink.com/get-rid-of-average-thinking-make-every-experience-count/, from December 2015.

[7]http://customerthink.com/dont-ask-know-what-are-your-customers-not-saying-not-doing/ from November 2015.

**Bill Price**
Driva Solutions

Bill Price is the President of Driva Solutions (a customer service and customer experience consultancy), an Advisor to Antuit, co-founded the LimeBridge Global Alliance, chairs the Global Operations Council, teaches at the University of Washington and Stanford MBA programs, and is the lead author of *The Best Service is No Service* and *Your Customer Rules!* Bill served as Amazon.com's first Global VP of Customer Service and held senior positions at MCI, ACP, and McKinsey. Bill graduated from Dartmouth (BA) and Stanford (MBA).

# The Accidental Customer Experience

## Ian Golding

I often write my blog posts and articles whilst travelling on either a train or an aeroplane. Although I can also be found hunched over my laptop keyboard in hotel rooms at twilight hours, the confined space of a metal tube travelling at high speeds is the perfect environment for me to commit my thoughts into words.

The irony (life is full of so many of them) in me choosing to make use of travelling time to write about my favourite subject, is that the experience of travelling on either a train or an aeroplane is rarely one that I will remember.

I am currently sitting on a Virgin train service on my way to London. Just over two hours of travelling time. This will be the tenth time I have used the service in 2018. In 2017, I travelled on the train to London approximately 25 times. 35 trips – 70 trains – in one and a half years.

I do not remember a single one.

In 2017, I flew on 85 aircraft. In 2018, to date, I have flown on 51 – 136 aeroplanes in one and a half years.

I remember three.

'So what?', you might ask. I can not blame you for doing so. I am not sharing my travelling record to receive adulation or sympathy. I am sharing these hard, cold facts to make a point. Having travelled on 206 trains and aeroplanes during an 18-month period, I can only recall my experience of doing so on three occasions – three! Of the three I remember, two were dreadful, one was lovely.

The point behind the fact is this – my travel experiences – much like anyone else – are almost entirely ones that fulfil only one thing – basic functional requirements. In every case (albeit not always as promised), the trains and aeroplanes I travelled on succeeded in getting me to my chosen location. A rather important customer need. As the core purpose of any passenger transport company should be underpinned by achieving the most fundamental need of their customers, this fact is not surprising.

If I delve deeper into the individual experiences on 206 trains and aeroplanes, the 'facts' become more interesting. These are some of the memories I recall from my 206 journeys, although I cannot exactly remember when most of them occurred:

- I liked it when Virgin trains enabled me to book my trip and retrieve my ticket entirely on my smartphone – it makes things so much easier
- The guard on a Virgin train I travelled on last year was incredibly rude
- The member of cabin crew who greeted me and my family on an Emirates flight from Dubai to Mauritius was really lovely – welcoming and caring
- An aeroplane I travelled on was really old
- An aeroplane I travelled on was brand new
- I still have not received an apology for the 17-hour delay I endured with Emirates
- I was impressed with the sincere apology for the 30-minute delay I experienced with Emirates
- The Air France pilot who introduced himself to his passengers by standing at the front of the aeroplane was fantastic
- It is so irritating that I always seem to be given excuses for things going wrong?
- The crew on many of my trips look so bored and disinterested
- The crew on some of my trips are really engaged with their passengers

I could go on. Some of these memories relate to more than one journey. They are a good summary of the kinds of things I can recall – although as I have already stated, not necessarily attribute to a specific journey.

It becomes clear that whilst not always on time, the providers of the services I am paying for are eventually meeting my basic expectation – my fundamental need. However, the occasions where my basic needs are exceeded, are remarkably few and far between. At the same time, this exposes the companies I choose to interact with to having a significant detrimental effect on my perception of them when they fail to meet the basic need – even slightly.

As a result, my recollection of the good and the bad is minimal – in other words, my ability to recall a specific experience is almost impossible. Now you may still be thinking, 'so what?' – again, you would be right to do so. The 'so what?' is as follows:

What is the actual experience the airlines and train companies I choose to interact with want me to have? In other words, what is their 'desired customer experience?'. How do they want me, a paying customer, to feel because of interacting with them?

Do they want me to feel…

a. Good about the experience?
b. Bad about the experience?
c. Nothing at all about the experience?

If the answer is c), then they are consistently meeting their objective. I am assuming (although we should typically avoid doing so), that no company would want the answer to land on b). If it is a), then the example of my 18-month travel history proves that they are very rarely achieving the aspiration.

Last year, I had the pleasure of meeting a senior leader from a passenger transport company in the UK. After two days of conversation and knowledge transfer about customer experience, he pulled me to one side and said:

"You have made me realise that we have been doing customer experience by accident"

I could not have said it better myself. What this incredibly honest and articulate leader was acknowledging was that whilst customers may be exposed to an experience that leaves them feeling a) good about the experience, this will happen by accident, rather than intent.

It is unfair of me to give the impression that the airline and rail industries are the only ones that are consistently delivering an 'accidental customer experience'. I would argue that most industries are. To determine if your business is doing the same, ask yourself these three simple questions:

1. as my organisation defined and communicated what they WANT the desired customer experience to be?
2. Do I know how my company WANTS our customers to FEEL because of their interaction with us?
3. Do I know how well we are doing at delivering the desired customer experience?

If you cannot answer all three questions, then it is very likely your organisation is delivering an accidental customer experience. You may be lucky – lucky that by default, rather than design, customers may be happy with the experience fulfilling the basic need. You may be lucky – your customers may largely not care about anything other the basic, functional experience. However, in all walks of life, relying on luck is a very risky business. At some point, luck will inevitably run out – usually when someone else provides the same product or service as one element of an intentionally designed experience that leaves customers feeling good – most of the time.

So what kind of organisation would you rather work for? One that delivers the intentional customer experience, or one that does so accidentally?

Ian Golding, CCXP
Customer Experience Consultancy Ltd

A highly influential freelance CX consultant, Ian advises leading companies on CX strategy, measurement, improvement and employee advocacy techniques and solutions. Ian has worked globally across multiple industries including retail, financial services, logistics, manufacturing, telecoms and pharmaceuticals deploying CX tools and methodologies. An internationally renowned speaker and blogger on the subject of CX, Ian was also the first to become a CCXP (Certified Customer Experience Professional) Authorised Resource & Training Provider.

# THE CX Skill for 2018

**Krista Sheridan**

**Be curious. Be lazy. Be often.**

Now, I am guessing your eyes might be lingering on the word "lazy" and be ready to stop reading. I get it. As a CX leader or practitioner, you're busy with a never-ending task list.

You wear many hats. You're a juggler, a cat-herder, a statistician, a storyteller. There is a priority and expectation that you come with a solid plan. That you have the answers. You're an expert. You get stuff done.

*You are anything but lazy!*

But I am going to ask you to give lazy (and curious, and often) a chance. Why? Because these things can put you on the path to becoming more "coach-like".

Ok…but why should you care about that?

**Because being more coach-like (not running off to become a full-blown coach, just borrowing some of the tricks of the trade, hence "coach-LIKE") is the key to working less hard, but getting more done and having more impact.**

It's about unlocking and leveraging the full potential of the people and teams you work with so you can have more impact, and without having to do it all yourself (fewer cats to herd, balls to juggle, etc.).

Now, if you're worried that becoming more "coach-like" will just add to your overflowing CX plate, let me assure you it will not.

**It doesn't add to your workload, it transforms it: Less but better.**

At TELUS, we are in the midst of re-thinking and refreshing our approach to coaching.

We are looking at how we can take what is typically thought of as a lengthy process and conversation only for leaders and their direct reports, *to a way of working*. How we can create a coaching *culture* focused on unlocking and leveraging the potential of *everyone* – leaders, peers, direct reports, vendors, customers –

*every day*, so we can generate new and better ideas. So we can have greater, more meaningful impact as individuals and as a business.

One of our partners on this journey is [Box of Crayons](#). They are helping us learn how we can all be more coach-like, and as it turns out, it does not have to be a long, complicated process.

We're learning that what gets in the way of us having more impact is often our desire to be helpful!

We want to help, we want to add value, so we're quick to jump in with answers and advice and start running. The rub is, when we rush in to help we often miss a boatload of great ideas (many better than ours!) and take on things that we didn't need to take on.

We're learning that if we slow down a bit we can:

- **Be more curious.** Stop rushing in to give answers and advice – tap into the potential and ideas of others first.
- **Be more lazy.** Instead of taking on everything ourselves, asking others how we can help *first*. They might not need us or, they may need something different!
- **Be more often.** Make *every conversation* more coach-like, and more impactful.

But how do you slow down when everyone is racing?

**Ask more questions.**

There are 7 questions in "[The Coaching Habit](#)" by Michael Bungay Stanier, founder of Box of Crayons. They are crafted to help you:

- Generate more possibilities
- Solve the right problem
- Take on the right work
- Make sure it happens

Here I will share the 4 questions that I think will have the most impact out of the gate for CX practitioners.

## (1) "And what else?" (Generating possibilities)

Generating new ideas and possibilities is key to continuously improving and innovating the experience you deliver to your customers.

Whether you are trying to get to the root of an issue, exploring a new course of action, brainstorming etc., asking *"and what else?"* is probably the quickest and easiest way to uncover and create new options, new possibilities, and new solutions.

It keeps you from running with the very first idea that pops up, which is never the only idea and rarely the best. It helps you tap into the collective experience and thinking of the group. Keep asking it until the answer is *"there is nothing else!"*

Some other ways to frame it?

- And what else is a challenge?
- And what else might be possible?

## (2) What is the real challenge here for you? (Solve the right problem)

We love to get things done. We love to move quickly. But moving too quickly can mean we find ourselves working on the wrong thing.

Asking, "What is the real challenge here for you?" helps you slow down and make sure you are solving the right problem, the one that will really move the needle when it's solved.

So after you have gotten a list of challenges through asking "And what else?" continue and ask the group or person you're working with: "So, what is the real challenge here for you?"

Resist the temptation to jump in and start fixing. Just listen. You'll leverage their expertise to narrow down the problem to solve, and you'll make sure you are working on the right thing.

## (3) "How can I help?" (Take on the right work)

You want to add value. You want to be helpful.

So, you can find yourself in a rush to jump in and take things on. The result is often an overloaded plate, and sometimes expending a lot of effort when it might not even have been needed.

Asking *"how can i help?"* stops you from leaping directly into action. It gives the other person or team time to think of what they really need and to make a clear ask of you.

So with a good question and a little slowing down, you can make sure you're spending your time where it's really needed, adding value (and appreciated!).

## (4) "If you're saying yes to this, what are you saying no to?" (Make sure it happens)

The problem with getting things done isn't usually a shortage of ideas, its execution. It's finding the resources to make it happen.

One of the ways to increase the chances of your CX plans having the impact you envision is to ask this question when new ideas or plans are on the table:

"If you/we are saying yes to this, what are you/we saying no to?"

It puts a spotlight on what is needed to make sure you have the space, focus and energy to get the "yes" done.

Take your time before you say "Yes", and if you do, make sure it comes with some "No"s.
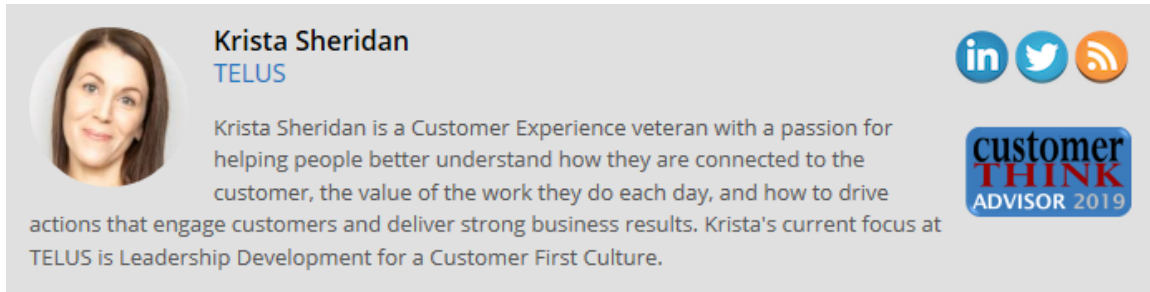
So, before you add one more thing to your CX plate. Before you spread yourself too thin. Consider being more "coach-like".

Be curious. Be lazy. Be often.

**You'll start to nudge towards a CX culture that is focused on unlocking and leveraging the potential of everyone every day. Generating more possibilities, solving the right problems, taking on the right work, and making sure it happens.**

Some additional resources:

- Box of Crayons
- The Coaching Habit
- More on asking great questions to improve CX!

**Krista Sheridan**
**TELUS**

Krista Sheridan is a Customer Experience veteran with a passion for helping people better understand how they are connected to the customer, the value of the work they do each day, and how to drive actions that engage customers and deliver strong business results. Krista's current focus at TELUS is Leadership Development for a Customer First Culture.

# Tech Companies: Beware of the NPS Blind Spot

Jonathan Klein

Imagine that your company's technology is loved by customers, considered 'best of breed' in the industry, and has a steady NPS, comfortably in the 20s, 30s or 40s. Now imagine that in the midst of this success, some of your longest standing accounts begin to drop, others scale back their usage, and referrals slow way down.

How, you ask, is it possible? After all, isn't the whole point of having a high NPS to ensure successful retention, upselling, and referrals?

Here's the secret: When it comes to technology, NPS has a blind spot.

One of the defining characteristics of the technology industry is that it is in a constant stream of disruption. Just think about some of the companies – Nokia, Netscape, and Blackberry just to name a few – that have come to market, risen to stardom, and then disappeared. At one time these companies had legions of loyal followers and likely very high NPS scores, but that didn't help them when the market changed.

*The reason: NPS tells you how you are doing today, but not how you will be doing tomorrow.*

This is why Topline Strategy adds a second dimension – Direction of Importance (DOI) – into the equation. To measure DOI, we ask "Is the importance of <company/product> to your business increasing, staying about the same, or decreasing?" DOI is then calculated like NPS (DOI = % Increasing – % Decreasing)

Figure 1 shows the 4 quadrants that are created by combining NPS and DOI, along with the strategic implications of each. On the right side of the matrix, NPS performs as expected, but on the left, it can lead you astray.

**Figure 1: Combining NPS and Direction of Importance Creates 4 Quadrants,
Each with Its Own Strategic Implication**
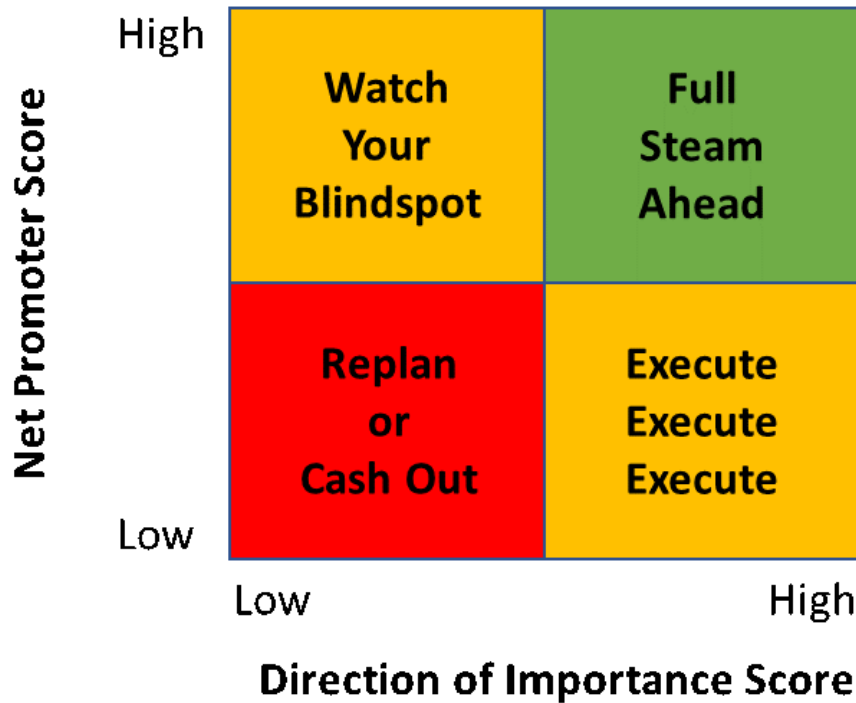


- **Full Steam Ahead** (High NPS, High DOI) – You are perfectly positioned for growth. Keep up the good work!
- **Execute, Execute, Execute** (Low NPS, High DOI) – Customers are invested in the product and want you to succeed. Focus on the blocking and tackling those key issues that are driving down NPS
- **Watch Your Blind Spot** (High NPS, Low DOI) – Don't let your NPS lull you into a false sense of security. This is where companies get blindsided by market changes. You need to put all of your effort into managing through the market transition and remember, even if you think you are on top of it, you haven't made it through until your customers say so.
- **Replan or Cash Out** (Low NPS, Low DOI) – Conventional wisdom would say focus on getting that NPS up. But conventional wisdom doesn't take into account that you're swimming against the market tide. Just fixing NPS won't do much good. Here, you have two choices: 1) Find a way to regain relevance or 2) Focus on the profitability of what is likely to be a flat or declining revenue stream.

## A DOI Case Study

For one Topline client, a provider of marketing analytics, DOI proved instrumental in enabling them to effectively respond to a key change in the market. Historically, marketing analytics has been a highly

fragmented field, with different tools used to measure the performance of different marketing tactics – television, radio, print, and each category of digital advertising (social, display, search, etc.).

Cross-media marketing analytics has long been a goal for the industry and our client was working toward transitioning from a provider of best-of-breed analytics in one type of media to offering an integrated suite of analytical tools for different media types.

The market however, headed in a different direction. Rather than consolidating into vendor suites, customers pursued a hub-and-spoke strategy – where one vendor was chosen to be as the central analytics hub that best-of-breed vendors plugged into. In terms of new revenue growth, much of it was coming from being chosen as the hub.

While our client's NPS remained high, due to the value provided by their best-of-breed solution and their high level of service, DOI started to decline as competitors, chosen as hubs, were elevated above them. As one customer stated, "[Your client] has been a really important partner for us and will be for a long time, but our roadmaps diverged and it isn't where I am spending my time."

Armed with this knowledge, our client changed course and opened up their system rather than continuing to try and compete as a closed suite. By quickly adapting to this change in the market, they were able to reposition themselves to successfully compete as a hub rather than being relegated to simply being a spoke.

## What is your DOI?

As these kinds of step changes happen in technology, companies with high NPS scores can get left behind. Promoters who find your technology less important over time will leave your blindsided. If you aren't yet measuring DOI, start now.



**Jonathan Klein**
Topline Strategy

Jon is the founder and Managing Partner of The Topline Strategy Group, a boutique strategy consulting firm that specializes in Market Strategy and Strategic Customer Experience for technology businesses. Jon brings a unique mix of strategy consulting and hands on operating experience to his work at Topline. Prior to founding the company, he held senior marketing roles at three venture-backed software companies and served as a Case Leader at The Boston Consulting Group. He holds an MBA from The Kellogg School at Northwestern and a BS in Electrical Engineering from Cornell University.

# Are You Really Engaging Customers? 3 Tips to Get It Right

**Ernan Roman**

Too many marketers assume that their strategies and offers are engaging their customers. This assumption is often wrong. Unless you are engaged in two-way dialogue and providing value-added communications...you have NO idea what customers think about your business and your marketing tactics.

We just completed VoC research for a major up and coming brand. A key competitive differentiator cited by customers was that the *company provides ongoing opportunities for feedback in all communications and sends friendly, engaging surveys and then acts on the suggestions from customers!* That makes customers feel included and valued.

Additional findings from our 16,000 plus hours of [VoC interviews](#) indicate that there is a *dangerous chasm between the cx fantasies of brands versus the disappointing cx realities of most consumers.*

Here are 3 Tips to help you get it right.

## #1 There is either high value engagement or NO value engagement

It is now the norm to hear from BtoB and BtoC customers of client brands such as IBM, HP, QVC, Gilt and Shinola, that they have higher and higher expectations for *cx excellence, and that this is becoming a core expectation*! Due to many smart competitors and more screens and options to choose from, customers are feeling entitled to demand the best or go elsewhere!

### Insights for you:

- As technology evolves, marketers are empowered to utilize *new avenues for engagement that push engagement to new heights.* Look at tablets, phones and smartwatches as opportunities to engage consumers when they are within a "range" of a physical store.
- But, be sure that *all messaging and online content is scalable to be presented on any screen size.* The multi-screen consumer is a great opportunity for higher levels of engagement and personalized content.

## #2 Listen first, then deliver on that need

Too often, marketers "spray and pray." This is a *useless and brand damaging activity*. In our VoC research, consumers consistently explain that they either want communications and experiences that *address their individual needs or, just don't communicate with them!* They view generic messaging as a waste of time and emphatically state that it *reduces the likelihood that they will open future emails from that company.*

### Insights for you:

- What do customers want? Have you asked? Or, are you blindly sending "vanilla" marketing "stuff" and missing the chance to *segment your messaging and connect on a deep and value-driven level with your segments and especially your microsegments.*
- Now is the time to equip your bricks and mortar staff with tablets to do appropriate preference profiling with customers.
- And, do post-purchase, cart abandonment, web abandonment consumer feedback on experiences to get a realistic view of what the actual customer experience IS, not what you THINK it is.

## #3 You can't build engagement without first building relationships

True engagement is rooted in the ability to forge strong relationships. This serves as the "grace account" upon which to draw when there is the inevitable problem or temptation from the competition.

**Insights for you:**

- Important new research findings: customers state that when they have just purchased is an appropriate and comfortable time to ask their deeper preferences, so the company can provide better levels of communication. This applies to purchases made in-store, online or via phone!
- This will enable you to understand your customers as *individuals not "cohorts"*. You want to learn what makes them unique, and what is unique about the way they want to engage with the company.
- Use that information to provide much smarter and value-oriented experiences that directly address their individual situation, needs, preferences, usage, and "wants."
- Setting up a preference center as part of your new customer onboarding enables you to capture valuable information right from the start that will shape relationship-building data-driven activities.

**Final Points**

When it comes to cultivating valuable and long-term relationships with customers, don't make any assumptions! And, don't make your sole focus the next sale. Instead, take time to nurture the relationship by demonstrating that you are caring and trustworthy.

You *cannot get to the next sale without developing a foundation that supports the previous sale.* Customers will be loyal based on how you treat them and engage them with compelling, value-driven content. Nothing less.



Ernan Roman
ERDM Corp.

Ernan Roman (@ernanroman) is president of ERDM Corp. and author of Voice of the Customer Marketing. He was inducted into the DMA Marketing Hall of Fame due to the results his VoC research-based CX strategies achieve for clients such as IBM, Microsoft, QVC, Gilt and HP. ERDM conducts deep qualitative research to help companies understand how customers articulate their feelings and expectations for high value CX and personalization. Named one of the Top 40 Digital Luminaries and one of the 100 Most Influential People in Business Marketing.

# Synchronous vs. Asynchronous Support Channels: Which is Better for Agents and Customers?

**Jeremy Watkin**

I've found the topic of support channel mix to be an interesting study in organizations. Traditional channels can be categorized a few different ways. Phone and video are live channels that use both spoken and nonverbal communication. Email, not a live channel, is a written mode of communication. Then there's chat that straddles the fence between phone and email, offering the ability for a live customer interaction but in writing.

The delineation between voice and text-based, live and not live has increased in complexity with the advent of new channels like text messaging (SMS), social media, Facebook Messenger, Apple Business Chat, and WhatsApp. How should these channels be categorized and handled?

## Synchronous vs Asynchronous

In a recent conversation with the folks over at Intercom, a provider of customer messaging software, I learned a new way of categorizing support channels – synchronous and asynchronous.

Synchronous communication is a live conversation with a clear start and end and can typically be identified by faster response times. This always includes phone but, depending on the software we use also includes live chat and other messaging channels. In synchronous conversations you might experience agents saying/writing things like, "Is there anything else I can help you with today?" or "Are you still there?" or "If I've resolved everything for you can you please click 'end conversation' in the top right corner of your screen?" At that point the conversation is complete.

Email is a good example of asynchronous communication that's a bit more open-ended and typically has slower response times. A conversation might be marked as "solved" in the ticketing system after responding but can easily be reopened by customers if they need to write back with more questions. In my conversation with Intercom, I was surprised to learn that their platform is asynchronous. I had initially categorized with traditional synchronous chat providers. With this platform, however customers can visit a company's website and initiate a chat with customer service. They can navigate away from the site and then come back later to continue their conversation with support.

Initially when I heard about this difference, especially for chat, I was skeptical. But when I recalled the number of times I've had customers complain that someone hung up on them during a chat conversation, it started to make a lot of sense. Still, I think there's a place in your customer support operation for both synchronous and asynchronous communication. Let's look at the advantages of each and then I'll conclude with some recommendations.

## Advantages of Synchronous

Let's first look at some of the advantages of synchronous communication – and in this group I would include phone, in person, video, and synchronous chat support.

- **Resolve complex issues more efficiently.** There comes a point in escalated asynchronous conversations that we need to cut to the chase and get their issue resolved. A phone call or an in person visit with someone who's empowered to solve the issue is still the best support channel for these sorts of situations.
- **Focus on the issue and customer from start to finish.** While the issue might not always be resolved on the first contact, there's always a start and a finish to these interactions and it's generally dictated by the customer. Assuming the customer can connect in a reasonable amount of time, they're more likely to address all of their concerns quicker through synchronous communication in a less drawn out way.
- **Non-verbal communication and the human connection.** The various synchronous channels I mentioned fall somewhere on a spectrum with in-person and chat support being on opposite ends. Nonverbal communication is important to human communication and the absence of it can be an obstacle to overcome. If there are aspects in the customer journey where a genuine human to human connection is required or desired, synchronous communication is the way to go.

## Advantages of Asynchronous

There are also some clear advantages to asynchronous communication and this includes email, sometimes chat, and for the most part social, SMS, etc.

- **Allow the customer to go at their pace.** Sometimes our customers lead busy lives and only have the time to send a quick message to support before they move on to another issue, appointment, or meeting. The ability to get the ball rolling now rather than waiting for a large enough window of time in their schedule is preferable – especially for issues that aren't as urgent.
- **Keep the conversation open-ended.** This is a sub point to the previous one. Many contact centers have a process, especially with synchronous chat that if customers don't respond in three to five minutes they say something like, "It appears you've stepped away. I'm going to disconnect this chat. Feel free to contact us again when you're back." I mentioned this earlier but I've reviewed enough of these conversations to know that customers often feel abandoned by support and dread having to initiate another chat to start all over again. Asynchronous communication keeps track of the conversation and doesn't require the customer to start over because it never actually ends.
- **A more mobile-friendly option.** We know that the increase in popularity of new messaging channels is due largely to our ever-increasing dependence on mobile devices. Channels like SMS, social, etc. thrive on mobile because of their ability to send short, quick messages. One of my long-standing pet peeves about synchronous chat support is that once I get an agent on the line, I'm tethered to my computer until that interaction completes. Asynchronous conversations move at the customer's pace, traveling with them on their preferred device(s).
- **A natural relationship with self-help.** Whereas synchronous messaging is better for the human connection, asynchronous paves the way for artificial intelligence to help answer some questions, especially those that might be easily solved with a knowledge base article. But before settings your sights on chatbots, here are some ways from a past column to use AI to understand the customer's needs and smartly serve up the right self-help content.

### What to consider when evaluating channel mix

So where does this leave us in the debate between synchronous and asynchronous communication? I'm not sure there was a debate to begin with. Both have clear strengths, but the mixture may look different for your organization depending on the customers you serve and the complexity of issues you handle. Here are some recommendations:

### 1. Know your customers, their issues, and expectations.

Are the issues urgent, complex, or highly technical in nature? What's the generational makeup of your customer base? You may find that for certain issues and people synchronous messaging is the way to go. I've worked with a number of startups that only offer email support and it's interesting reading survey feedback where customers say, "PLEASE CALL ME" or "PLEASE GIVE ME A NUMBER TO CALL SUPPORT." Receive enough of that kind of feedback and it's a clue that asynchronous communication might not work for all situations.

### 2. Start by offering great service on existing channels before adding more.

How many companies spin up social media teams because their phone support sucks? That's a gross generalization but if the motivation to add any support channel is solely to mitigate poor service levels on another channel, the problem will only get worse. Beefing up self-help content is a good first step to help peel off some of the unnecessary volume to existing channels. From there you may need to seriously test

whether or not adding a new channel will significantly reduce volume on other channels and improve your overall customer experience.

## 3. Use fewer tools, not more.

With the right tools you can consolidate asynchronous messaging so agents aren't juggling several different platforms. I recently had a great conversation with the folks at Sparkcentral about their expansion from a social media engagement platform to include SMS, in-app, and on-web messaging. And it's not just them. Many others are moving in this direction. This also makes staffing those channels and appropriately prioritizing the work a whole lot easier.

## 4. Empower agents to move conversations from asynchronous to synchronous and vice versa.

There will be times when the issue at hand is best resolved in another support channel and agents should be empowered and encouraged to understand when it's time to switch. Here are a few examples:

- After several emails back and forth we discover the issue is highly technical and we're getting nowhere. It's time to pick up the phone and call the customer.
- A customer sends a question that's covered in the knowledgebase. We answer the question in the channel they initially used but we also take the time to educate them on some of our fantastic self-help resources.
- The customer has stepped away from their desk during a synchronous chat conversation and we need to move on to other chats. We open a ticket with a copy of the chat conversation and send the customer an email. They can then reply in an asynchronous channel at their convenience and pick up right where they left off.

Chances are that your customer service operation supports both synchronous and asynchronous communication channels and that's great. There's a time and a place for both and hopefully these recommendations help you do them well. If you have a moment, please share your thoughts on support channel mix in your organization and the whys behind it. How did you arrive at that channel mix and what strategies do you have in place to communicate with customers on the channel appropriate to their preference and issue type?

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