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Customer Experience FOR DUMMIES®

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Excellent
Very good
Good
Average
Poor

Learn to:

- Move past "satisfaction" to engagement
- Measure the financial return of engaged customers
- Map your customer touchpoints
- Create measurable customer change

Roy Barnes
Authority on customer experience design and performance management

Bob Kelleher
Author of Employee Engagement For Dummies

Customer Experience

FOR DUMMIES®

A Wiley Brand

by Roy Barnes
and Bob Kelleher

FOR DUMMIES®
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Customer Experience For Dummies®

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Customer Experience For Dummies®

Visit www.dummies.com/cheatsheet/customerexperience to view this book's cheat sheet.

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- Exceptional Service, Exceptional Profit: The Secrets of Building a Five-Star Customer Service Organization
- What’s the Secret? To Providing a World-Class Customer Experience
- Managing Customer Relationships: A Strategic Framework
- Story: Substance, Structure, Style, and the Principles of Screenwriting
- The Design of Everyday Things, Living with Complexity, and Emotional Design

About the Authors

Cheat Sheet

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Introduction

After graduating from college, I (coauthor Roy) spent five years in Alaska, thanks to a research grant from the National Endowment for the Humanities. During that time, I spent one summer working at a fish camp with a 70-year-old Athabascan Indian named Al Frank. Al and I passed our days catching and drying salmon. He used the salmon to feed his family and his team of 18 sled dogs throughout the year. When the salmon were spawning (that is, swimming upriver to lay their eggs), Al had to catch and store as many fish as he could to survive the fall and long winter.

One windy afternoon, I was standing on a bluff overlooking the Yukon River, watching Al work. Suddenly, a black bear burst from the brush at the river's edge and galloped straight at Al. Sensing the threat, Al looked up, dropped his gutting knife, and took off running as fast as his legs could carry him. But he didn't run away from the bear. Instead, he ran *toward* it, waving his arms and hollering. Mystified, the bear skidded to a stop. Then it turned tail and headed back the way it had come. I was dumbfounded! For his part, Al walked back down the riverbank, picked up his gutting knife, and got back to work as if nothing had happened.

I scrambled down the bluff and ran to Al. Wide-eyed and excited, I asked him what in the world had made him run at the bear. Completely calm, Al answered, "What were my choices?" He explained, "If I'd stayed where I was, he would have gotten me. If I'd waded into the river, he would have gotten me. If I had tried to run away, he would have come after me and taken me down." Then, with a smile on his face, he said, "Roy, sometimes you have to be the one to decide to control events. You have to decide the outcome. *You have to control the experience.*”

I’ve never forgotten what Al said that day — and it applies to nearly every aspect of life. Not surprisingly, that includes customer experience.

This book is all about designing, monitoring, and controlling experience — specifically, customer experience. In it, you’ll find out what customer experience is, why it matters, and the essential steps to controlling it and making it stick. As you read this book, you’ll quickly discover that in customer experience, as in life, you have to charge at the bear!

About This Book

Above all, *Customer Experience For Dummies* is a reference tool. You don’t have to read it from beginning to end. If you prefer, you can turn to any part of the book that gives you the information you need, when you need it.

In addition, you can keep coming back to the book over and over. If you prefer to read things in order, you’ll find that the information is presented in a natural, logical progression.

Sometimes we have information that we want to share with you, but it relates only tangentially to the topic at hand. When that happens, we place that information in a *sidebar* (a shaded gray box). Even though it may not be mission-critical, we think you’ll find it worth knowing. But you don’t have to read it if you don’t want to.

Within this book, you may note that some web addresses break across two lines of text. If you’re reading this book in print and want to visit one of these web pages, simply key in the web address exactly as it’s noted in the text, pretending as though the line break doesn’t exist. If you’re reading this as an e-book, you’ve got it easy — just click the web address to be taken directly to the web page.

Foolish Assumptions

You don’t need an MBA to understand the contents of this book. It’s written in conversational, jargon-free prose. However, you’ll note that much of the advice in this text is geared toward those in management.

That said, the principles and best practices outlined in this book apply to everyone. So even if you manage no one, you’ll find loads of tips and ideas in this book that will help you boost customer experience in your organization.

Icons Used in This Book

Icons are those little pictures you see in the margins throughout this book, and they’re meant to draw your attention to key points that can help you along the way. Here’s a list of the icons we use and what they signify.

When you see this icon in the margin, the paragraph next to it contains valuable information that will help make your life easier.

Some information is so important that it needs to be set apart for emphasis. This icon — like a string tied around your finger — is a friendly reminder of info that you'll want to commit to memory and use over the long haul.

This icon highlights common mistakes and pitfalls to avoid. An important part of achieving success is simply eliminating the mistakes; the information marked by this icon helps you do just that.

On occasion, we use real-world examples to illustrate the point at hand. Those examples are called out with this icon.

Beyond the Book

In addition to the material in the print or e-book you're reading right now, this product also comes with some access-anywhere goodies on the web. Check out the free Cheat Sheet at `www.dummies.com/cheatsheet/customerexperience` for tips on the key steps to implementing a customer experience program, the best tactic for dealing with angry customers, and 20 questions you can ask to begin your own customer experience diagnostic. You'll also find links on each of the Part intro pages for accessing additional content, including articles on managing larger-scale touchpoint redesign efforts, an example of great customer experience in action, a discussion of using a text analysis tool to sort through customer feedback, and more.

Where to Go from Here

This book isn't linear. Although you can certainly read it from cover to cover, you don't have to. You can start anywhere!

Glance through the table of contents and find the part, chapter, or section that flips your switch. That's the best place to begin. If you're already sold on customer experience and want some ideas for launching your own program, turn straight to Part II. If you're keen to discover customer experience killers — those things that ruin customer experience — start with Chapter 3. If you're in hiring mode, Chapter 13 — which discusses the traits and behaviors you need to build a workforce of customer experience advocates — is a great place to start. Or you might turn to Chapters 15 and 16 to find out how to measure your progress.

When you're finished reading this book, expand your knowledge by reading the books listed in Chapter 21. A free online article that accompanies this book also cites LinkedIn groups, summits and conferences, and blogs that focus on customer experience. You'll quickly discover that customer experience is a big and growing field, and there's a lot to learn!

Part I

What Is Customer Experience?

getting started
with
Customer
Experience

For Dummies can help you get started with lots of subjects. Visit `www.dummies.com` to learn more and do more with *For Dummies.*

In this part…

- ✓ Get clear on what customer experience is and what it means for your organization.
- ✓ Assess the impact of customer experience on your business’s bottom line.
- ✓ Identify practices and behaviors that kill customer experience.
- ✓ Diagnose customer experience problems in your own organization.
- ✓ Discover how best to handle angry customers.

Chapter 1

Basic Training: Customer Experience Basics

In This Chapter

- Looking at eight essential steps to creating a great customer experience program
- Understanding why little things mean a lot
- Considering why the "low-hanging fruit" approach doesn't work
- Appreciating the importance of "owning" customer experience
- Thinking of customer experience as the ultimate competitive advantage

Before you can work to improve customer experience, you need one key piece of information: what customer experience *is.* The best definition we've seen comes from customer experience thought leader Colin Shaw:

> Customer experience is the sum of all interactions between a customer and your organization. It's the blend of your organization's physical performance [and] the emotions that you create all measured against customer expectations across all of your points of interaction.

Or to put it another way: Customer service is an attitude, not a department.

Simple, right? Well, maybe not. If you begin to dissect Shaw's observations, you quickly discover the daunting nature of the challenge in front of you.

Start with the first part of Shaw's statement. If customer experience really is "the sum of all interactions between a customer and your organization," that means it's a big problem if a customer's interaction with you is off the charts but merely okay with the next person in your organization that he deals with.

For customer experience to be great, every interaction at every customer touchpoint must be exceptional. In other words, the whole organization must work together to deliver a great customer experience. This is surprisingly rare, however. In our experience, organizations are pretty fragmented. Marketing is its own domain, separate from sales, which is separate from operations, which is separate from customer service, and so on. If your goal is to significantly improve your customer experience, you have to ensure these functional areas start communicating and working together.

Now move on to the second part of Shaw's definition: "It's the blend of your organization's physical performance [and] the emotions that you create all measured against customer expectations across all of your points of interaction." By "physical performance," Shaw refers to your organization's ability to produce and deliver a good quality product or service. The takeaway here is that if you want to deliver good customer experience, then offering a product or service that works, is reliable, and isn't a pain in the neck to use is a given. It's the bare minimum.

What about "the emotions you create"? Yes, great customer experience means creating and effectively managing your customers' emotions. The fact is, there's not a single interaction that occurs between an organization and its customers that doesn’t foster an emotion of some kind. Whether that emotion is deep frustration or sheer delight is largely up to you and how thoughtfully you design, plan, and execute your customer experience.

And of course, there’s the “measured against customer expectations across all of your points of interaction” bit. In other words, in delivering a great customer experience, you must consider your customers’ expectations. Realize that each of your customer touchpoints affirms or negates the expectations that each customer brings to an interaction.

Moreover, be aware that consumers are quick to transfer their expectations of great customer experience from one industry to another. That means when it comes to delivering a great customer experience, you’re not just competing with the store down the street … you’re up against everyone, everywhere. (And to make matters worse, your customers are likely discussing your shortcomings on every social media channel possible!)

Over the next 300+ pages, this book delves more into what customer experience is and how best to deliver it. In this chapter, we discuss the eight essential steps to creating a great customer experience program, why “the little things” are a big deal, and a few other important topics that you need to understand before you begin the work of creating and consistently delivering a great customer experience.

Eight Steps to Creating a Great Customer

Experience Program

There are eight essential components to building a great customer experience program:

1. Developing and deploying your customer experience intent statement
2. Building touchpoint maps
3. Redesigning touchpoints
4. Creating a dialogue with your customers
5. Building customer experience knowledge in the workforce
6. Recognizing and rewarding a job well done
7. Executing an integrated internal communications plan
8. Building a customer experience dashboard

We talk about each of these in detail throughout the book. For now, we give you a quick overview of each step.

Step 1: Developing and deploying your customer experience intent statement

The process of building your customer experience program starts here, with a formal declaration of your desired customer experience through an intent statement. The intent statement directs all subsequent work. Although the intent statement is related to and supportive of brand positioning, it’s not a marketing slogan. The intent statement is more akin to a set of engineering schematics. It’s a formal, defined set of criteria against which the organization can manage and monitor the delivery of customer experience. For more information on developing your customer experience intent statement, flip to Chapter 6.

Step 2: Building touchpoint maps

If you want to provide excellent customer experience, you need a deep understanding of how your customers interact with your business at each of your individual touchpoints as well as across your entire organization. To gain this understanding, you must map your customer's journey and the touchpoints they interact with along the way. This analysis provides you with a clearer understanding of your customers' experience with your organization. You can find out more about building touchpoint maps in Chapter 7.

Step 3: Redesigning touchpoints

You'll likely need to redesign one, some, or even all of your customer touchpoints to improve the experience your customers are receiving. Fortunately, the redesign process for each touchpoint requires just four weeks, or 20 workdays. No more, no less. (Due to an alarmingly prevalent bureaucratic condition — CADD, or corporate attention deficit disorder — redesign efforts must be very tightly scoped and time-limited.) During this period, the touchpoint redesign team brainstorms, proposes change, and executes on its proposal. In addition to creating change fast, this process also results in a widely dispersed set of enthusiastic customer experience change leaders. For details on this redesign process, turn to Chapter 10.

Step 4: Creating a dialogue with your customers

When it comes to getting feedback from customers, annual surveys are *out,* and constant listening and providing real-time dialogue is *in.* That means you need to inventory where you are listening effectively today, prioritizing your highest-value listening and dialogue touchpoints, and creating a governance model for managing and responding to customer feedback. The end game here is to be able to converse with your customers in near real-time and to respond to customer concerns, problems, and suggestions as they happen. For more on getting feedback from customers, see Chapter 11.

Step 5: Building customer experience knowledge in the workforce

Employees who regularly interact with customers need to understand not only what customer experience your organization intends to deliver (your intent statement), but also how to deliver that experience. Most employees are trained only on the specific functions needed to execute their individual part of their siloed business process. Very few are given real-world, hands-on, practical experience in exactly *how* to deliver great customer experience. That has to change! Chapter 12 discusses the ins and outs of building customer experience knowledge in your workforce.

Step 6: Recognizing and rewarding customer experience done well

Your organization’s compensation system telegraphs to all employees what’s really important and what isn’t. If rewards (compensation and so forth) and recognition programs don’t reflect your focus on customer experience, then even your very best efforts to turn your company’s culture customer-centric will ultimately fail. The program will also fail if you reward individuals who “make their numbers” but act in a way that ignores or injures the customer experience. Chapter 13 covers the rewards of rewarding correctly.

Step 7: Executing an integrated internal communications plan

If your organization's leaders rarely mention customer concerns, issues, or opportunities, then all the best internal marketing will fall short of fostering significant cultural change. The fact is, making your organization customer-centric is an uphill battle. It is winnable, but significant resources — both financial and philosophical — need to be brought to bear, including a robust internal communications effort. For more on executing an integrated internal communications plan, see Chapter 14.

Step 8: Building a customer experience dashboard

Feel-good customer initiatives are a no-go. These must be replaced with laser-guided projects supported by clear and formal performance metrics with assigned and owned commitments. Real metrics and aggressive goals drive accountability for improvement and help kill misaligned initiatives. To help you keep track of your metrics and data, you'll want to build a highly visible customer experience dashboard and to regularly monitor, review, and discuss each measure it contains. Chapter 15 covers building a customer experience dashboard in more detail.

Little Things Matter More Than You Think

When I (coauthor Roy) was growing up, we spent our summers in rural New England, in the small village of Post Mills, Vermont (population 346). Post Mills didn't have a lot of people, but it did have a tiny airport, which consisted of two grass runways and an old wooden hangar that housed the mechanic's shop and the office for the local flight school.

The flight school was run by a guy named Bob Burbank and his wife, Janie. Bob provided instruction in both powered and sail planes, and also taught aerobatic flying. Janie, a great aviator in her own right, piloted the tow plane whenever Bob took the glider out.

I worked for the flight school for many summers — paid not in cash, but in flight time. It was my job to mow the lawn (including all 2,900 feet of each runway), and to gas and wash the planes. I was also responsible for vacuuming out the dust, dirt, and gravel that inevitably collected in the cockpits of each Cessna and Piper Cub, as well as in the Citabria, which was Bob's stunt aerobatic plane.

Every morning, I rode my bike down to the airport. One day, as I coasted to a stop and leaned my bike against the hangar, Bob was outside waiting for me. This was unusual.

"What'd you have for breakfast?" Bob asked.

"Rice Krispies and a banana," I replied.

"Okay," he said. "Let's go."

This was not the normal routine. But being 14 and having a thirst for adventure, I did as I was told. I climbed into the back seat of the two-seater Citabria stunt plane.

Bob started the fabric-skinned plane and taxied to the head of the grass runway. Then he turned the plane’s nose into the wind and applied full throttle. In short order, the plane was in the air. At about 8,500 feet, Bob called out, “All buckled in?”

“Yes!” I replied.

Bob quickly rolled the plane to the right, until we were completely upside-down.

It’s an amazing feeling, being upside-down. I don’t know — maybe it’s all the blood sloshing around in your noggin. Whatever it is, everything slows down and becomes magnified. But this time, something else happened, too: The air in the cockpit became clouded with dust, dirt, and airborne bits of gravel. Clearly, I’d done a poor job vacuuming the cockpit of the plane!

Still upside-down, with the heavier pieces of dirt and gravel now resting on the ceiling, Bob turned around and grinned at me. “Roy,” he said. “Sometimes the smallest thing you do can make a really big difference.” He went on: “When I’m trying to teach someone to do stunts in the plane, it makes the experience a lot less enjoyable when we have to wait for the air to clear.” Lesson learned!

REMEMBER

> In customer experience, as in aircraft maintenance, the little things matter a lot — disproportionately so. In fact, they often make the difference between a loyal customer and one who unabashedly takes to the Internet to criticize your company. Be warned!

Avoiding the “Low-Hanging Fruit” Approach

We hear it all the time: “Let’s identify the low-hanging fruit and pick that first.” In other words, let’s figure out which customer experience problems are simple to solve, and deal with them first.

The problem? Although a few customer experience problems *are* simple to solve, the vast majority aren’t. That’s because most customer experience problems are the result of complex issues that affect the entire enterprise. Customer experience is a holistic thing, created by many different individuals, processes, and departments, company-wide. Problems with customer experience are overwhelmingly systemic in nature.

Still, taking the quick-fix approach may seem like a good idea — after all, who doesn’t want to see results, like, pronto? But this approach often causes yet more problems downstream. It’s far more effective to develop comprehensive solutions to your customer experience problems, even if doing so takes more time.

Defining Who Owns the Customer Experience

Does your organization have a chief customer officer — one person who is responsible for ensuring that your customers enjoy a great customer experience? Or is there an ombudsman of sorts — someone who has the power and “air cover” to strongly advocate for the customer’s best interest? Probably not.

Only a very few organizations have this role, but most should. In most companies, no one is responsible for managing customer experience in its entirety. In fact, most businesses are so siloed, so internally focused, that the customer —his issues, perspectives, and problems — is rarely even discussed!

Typical employees — whether they’re in the executive suite or deep in the trenches — are paid to focus on their discrete slice of the business. Whether they’re in IT, HR, operations, sales, marketing, accounting, or what have you, their job is to optimize their piece of the pie, becoming more efficient and effective. This naturally leads to an inside-out, company-centric view, rather than an outside-in, customer-centric focus. If there’s no individual or team to formally steward the customer’s interest, then over time, customers — individually or collectively — will find themselves neglected or abused.

Customers are a common resource/asset and must be managed as such. Just as most organizations have dedicated asset managers to manage their inventories, physical structures, portfolios, and so on, so, too, should they have employees dedicated to managing customers — making sure their needs are met and their long-term sustainability is ensured.

The “tragedy of the commons”

This phenomenon is not new. In the late 1960s, ecologist Garrett Hardin described it as the “tragedy of the commons.” According to Hardin, individuals acting independently and rationally according to their own self-interest will, over time, act in a way that is contrary to the whole group’s long-term best interest by depleting common resources. If you replace “individuals” with “departments” (think marketing, sales, or field