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Customer Experience Design Toolkit 2018

“We can't solve problems
by using the same kind
of thinking we used when
we created them.”

ALBERT EINSTEIN

About This Toolkit

This toolkit provides you with a summary of key tools useful for customer experience (CX) design. These tools can be used to help your teams step into your customers shoes and take an outside-in customer centric approach to CX management.

Customer Experience Tools explored:

PART I: PREPARING FOR CUSTOMER EXPERIENCE DESIGN

1. Customer Personas
2. Empathy Mapping
3. Stakeholder Mapping

PART II: MAPPING THE CUSTOMER EXPERIENCE

1. Focusing Challenge
2. Qualtrics Five A's Customer Journey Mapping Framework

PART III: BUILDING THE FUTURE STATE EXPERIENCE

1. Five Why's
2. Brainstorming
3. Experience Design Prioritisation

For each tool, this toolkit walks you through the overview, methodology and benefits, and provides you with a template that will help you complete these activities with your team.

Adam Marks & Vicky Katsabaris
Principal Consultants, Qualtrics

PART 1

Preparing for Customer Experience Design

Customer Personas

TIP

Select 1-2 primary personas which will ensure your team has a clear focus for experience design.

OVERVIEW

A persona is a 'character' developed through research, to represent a common group of people.

Personas;

- Help you build a deeper understanding of your customer
- Are derived from research insights, demographic data, and customer interviews
- May have 1, 5, or even more. In B2B there may be multiple customers (and hence personas) for each opportunity.

BENEFITS

To design meaningful experiences, you need to develop a connection with your customers and design experiences for your most valuable segments. If you start with building empathy and understanding the profile of your key customer segments you have a way to connect with them so that everyone has a shared understanding of their demographic profile, behaviours and pain points.

Customer Personas

METHODOLOGY

To build your Customer Personas:

- Conduct customer research
- Analyse and theme your data to draw meaningful insights that relate to various customer types
- Build various personas using the template that bring to life the unique needs, behaviours and pain points of the different customer segments that are impacted by your product or service
- Include customer comments that are representative of that segment to make it really personal and bring to life the customer persona
- Make your persona's visible - print them out and include them within your project space as a constant reminder and tool
- Persona's are not static documents, the content changes as you become more informed. Make sure you continually update them and challenge content within them.

Customer Personas

IMAGE

Bring the persona to life by including a visual identity

DEMOGRAPHIC PROFILE

Name, Age, Family, Job, Education, etc.

ATTRIBUTES & MOTIVATIONS

What is important to understand about how this customer deals with your organisation today? (e.g. Tenure, SOW, etc.)

NEEDS

What matters most to your customer?

PAIN POINTS

What issues does the customer experience?

CUSTOMER QUOTES

What are the representative customer quotes which brings all this to life?

Empathy Mapping

TIP

Insights come from asking 'why' and understanding why there are gaps & pain points.

OVERVIEW

An empathy map is a tool used to better understand the needs of customers. It allows teams to provide a complete picture of the customer and what actions they might take as a result of their beliefs, emotions and behaviours. It is a tool often used to synthesize data gathered from customer interviews.

BENEFITS

This tool helps you step into your customers shoes and understand the needs of customers and the business.



Empathy Mapping

METHODOLOGY

Empathy mapping uses 4 quadrants labelled as 'THINK', 'FEEL', 'SAY', 'DO' to help make sense of different aspects of the customers experience and preferences.

- Select one person to present the observations made during customer interviews.
- The team completes the "THINK, FEEL, SAY & DO" sections of the 4 quadrants using post-it notes as data is being presented.
- Capture one idea per post-it. Cluster the post-it notes into key themes.
- Complete the PAINS and OPPORTUNITIES section using the insights derived through the exercise
- Take time to look at the differences between what customers 'SAY' and what they actually 'DO' to capture the key insights and critical customer needs.

Empathy Mapping

THINK

What are their thoughts, values and beliefs?

FEEL

How do they feel about the experience? What really matters to them?

SAY

What are they saying? (Include customers quotes)

DO

What are their actions and behaviours?

PAINS

OPPORTUNITIES

Stakeholder Mapping

TIP

Stakeholder planning should be done regularly to track changes in stakeholder attitudes over time.

OVERVIEW

Stakeholder management is the process of understanding the attitudes of stakeholders before initiating a potential change with the goal of **developing alignment & collaboration** between the various groups.

A stakeholder is any person or group who can be positively or negatively be impacted by, or cause an impact on the success of an initiative, project or change. The stakeholder landscape is made up of Supporters, Champions, Gatekeepers and Bystanders and the engagement strategy will differ for each group.

BENEFITS

Stakeholder planning helps to identify:

- Stakeholders' needs and interests
- Mechanisms to influence stakeholders
- Potential risks
- Key people to keep informed about changes
- Negative stakeholders and their adverse effects on the change

Stakeholder Mapping

METHODOLOGY

- Identify the impacted stakeholder Business Unit groups
- For each group identify specific stakeholders and their business role and identify a relationship owner for that stakeholder.
- Rate each stakeholder's **level of Influence** to the change or project if they are not supportive (High or Low)
- Rate each stakeholder's current **level of visible support** for the change (High or Low)
Consider if stakeholder . . .
 - Actively engages other stakeholders to foster opposition and undermine project success
 - Passively demonstrates opposition to the project. May verbally communicate lack of support to others, but does not attempt to undermine project success
 - Passively demonstrates a support for the project. May verbally communicate support to others
 - Actively demonstrates support and engages other stakeholder to foster support for project success

Stakeholder Mapping

METHODOLOGY

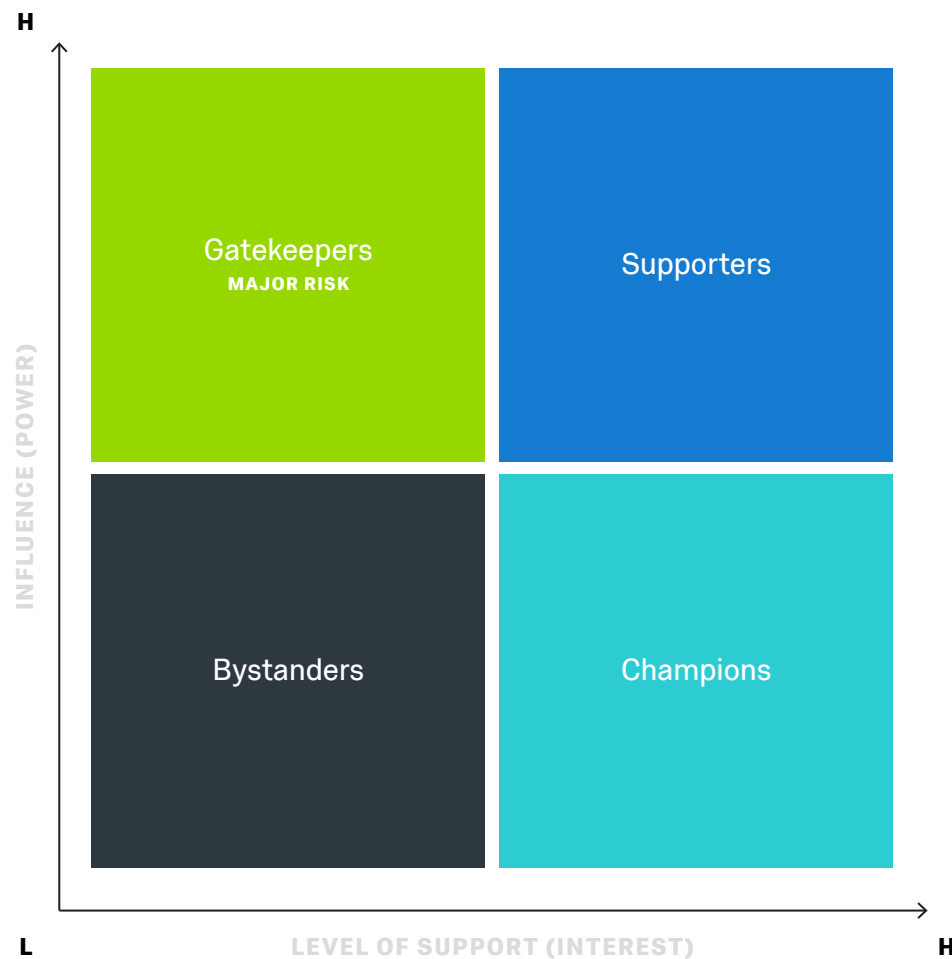
- Map stakeholders into the 4 quadrants to determine the best engagement strategy
 - **Champions** (*high support, high influence*)
Keep champions close as project partners who can help to influence other stakeholders
 - **Supporters** (*high support, low influence*)
Involve supporters with the project team to leverage their enthusiasm
 - **Bystanders** (*low support, low influence*)
Keep this group well informed via mass communications
 - **Major Risks** (*low support, high influence*)
Investigate concerns from this group and leverage champions to improve their support
- Identify stakeholders where their current rating is lower than their required rating and highlight those stakeholders for **increased focus**.

Stakeholder Mapping

METHODOLOGY

- **Describe the stakeholders' needs** for those who require increased focus: Discovering the key concerns may require a different strategy depending on the stakeholder (e.g. seniority, location). Some common tactics include:
 - Approach them directly and ask what change would be required to gain their support
 - Ask supportive stakeholders who are close to the opposing stakeholder
 - Review the stakeholder's behaviours with your team to determine common themes and appropriate actions
- Develop a stakeholder **influence strategy** based on their concerns and their classification on the stakeholder map

Stakeholder Mapping



■ Supporters

High Interest & High Power: Engage frequently and consistently; seek input, listen and build shared consensus, mutual benefits. Supports change and has demonstrated a high level of change leadership

■ Champions

High Interest & Low Influence: Engage regularly; maintain two-way conversations to ensure that no major issues are arising and leverage as advocate for change

■ Gatekeepers: Major Risk

Low Interest & High Power: Share timely information at regular intervals to mitigate any potential major risks

■ Bystanders

Low Interest & Low Power: Share information when required using mainstream existing communication channels

Level of Impact

Low - Changes will have minimal affect on stakeholders' role

High - Changes will directly affect stakeholders' role and the way they do their job

PART 2

Mapping the Customer Experience

Focusing Challenge

TIP

You can have more than one focusing challenge but there should always be a primary focus which captures the focus of the entire challenge.

OVERVIEW

Before you set up a customer project, you need to align your stakeholders on the primary intent.

Creating a focus is critical to align teams and clearly define the set boundaries to explore. This enables you to focus your team's thinking to drive the right action. It removes any assumptions within a project statement to guide clear direction.

It's also important to build clarity and align expectations across many stakeholders with differing viewpoints.

BENEFITS

To set up a customer project or initiative, you need to spend time understanding and defining your customer challenge. A focusing challenge will help you to clearly define your future state vision or challenge and communicate the intent across the business.

Focusing Challenge

METHODOLOGY

In order to define your focusing challenge, you need to ensure you have the right people in the room to align around the customer challenge before you start jumping into solution mode.

Use the 'who', 'what', and 'why' framework to craft your challenge.

Words drive action so be mindful of what you're saying using these principles;

- Keep it simple – no ambiguous long complex statements
- Avoid business jargon – ensure everyone understands
- Be specific & open – don't ask closed questions
- Be inspiring – it should be interesting, inspire momentum and direction

Your focusing challenge should be revisited if new data or research is available so that you can include any newly identified insights and opportunities.

Focusing Challenge

_____ can

WHO

DO WHAT

so that _____

WHY (THE OUTCOME)

Introduction to Customer Journey Mapping

TIP

Customer journey mapping may begin internally with the team but it should always be validated with customer research!

OVERVIEW

A Customer Journey Map is a design tool that provides a view of the end-to-end experience of your customers. It is a way of visually illustrating customers' processes, needs & perceptions throughout their interaction and relationship with your organisation.

Customers all follow a particular pattern as they decide to interact with your organisation – they discover a need, do their research, make a purchase, get delivery, own/use, maintain, and hopefully recommend . . . until it's time to buy again and if you get it right, come straight back to you.

The Customer Journey Map outlines customer needs, pain points, opportunities and different interaction points which accumulate to build a comprehensive "journey" based on their experiences. You can use journey mapping at the beginning of a project to map out the current state, and then again to map out and design the desired future experience.

Introduction to Customer Journey Mapping

BENEFITS

Journey Mapping is the starting point for building any feedback program as it provides a systematic approach to identifying what to measure. Journey mapping can be conducted pre-research to gain consensus on the group's current understanding of the customer experience. Completing a journey before research helps you to understand gaps and to inform research that needs to be conducted in order to paint an accurate picture of the customer experience. Customer Journey Mapping is also a useful tool to iron out your customers pain points, before overlaying their interactions with the ideal target state experiences you want to offer.

METHODOLOGY

To build your Customer Journey Map:

- Conduct customer research and leverage existing data from across your business to gain an understanding of the end-to-end experience.
- Create a large table which displays the key steps through time on the horizontal axis, and themes for analysis on the vertical axis. The steps on the horizontal axis will vary according to the Customer Journey you're working on, but the vertical axis will usually stay the same.
- Select a customer persona to map their end-to-end experience.

Introduction to Customer Journey Mapping

- Map out the key steps across the journey. If mapping the digital experience, be sure to take advantage of Google Analytics and other tools that can support your conversion funnel.
- Work together to fill in the grid by working your way from left-to-right / top-to-bottom, regularly referencing the empathy map as a source of inspiration. Make sure you use post-it notes as you complete the grid as there will be many changes.
- Once you fully map the customer experience, identify pain points and use the 5 Why's model to determine the root cause.
- Leave the opportunities row to last so you have a good understanding of the pain points to solve.
- Test and validate your journey map against your Focusing Challenge – have the courage to challenge the direction of your initiative if the insights and end-to-end experience reveals undiscovered needs.
- Disseminate and validate your current-state journey map with stakeholders across multiple business units.
- Have your journey on display so that it is visible to the project team. It should be a living document that is built upon as the group gains a more detailed understanding of the experience.

Qualtrics 5A's Customer Journey Mapping Framework

TIP

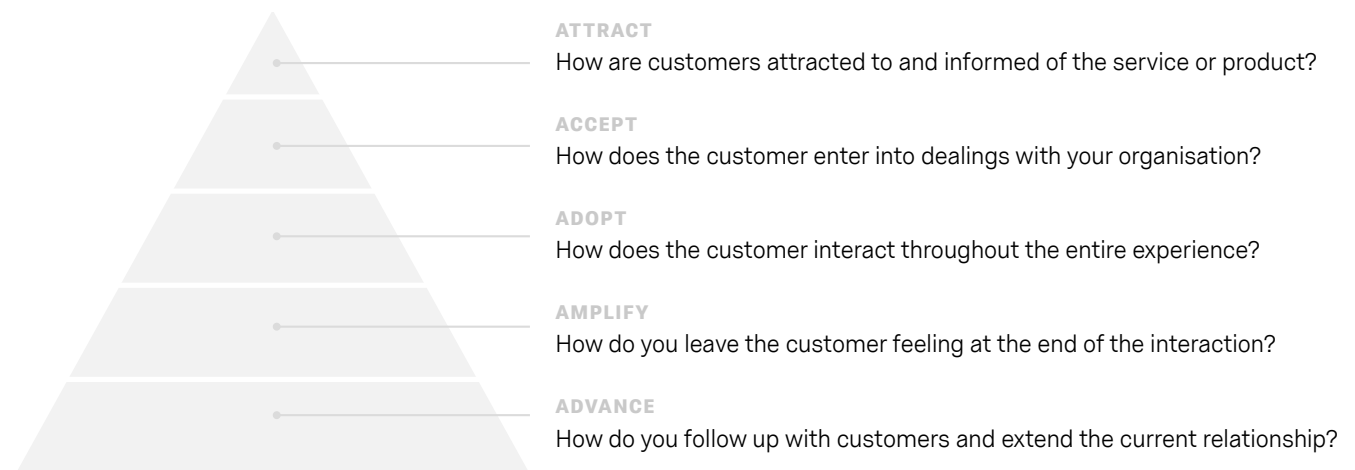
Involve customers in your session or appoint someone to represent your customer using the empathy map as a source of inspiration.

OVERVIEW

Qualtrics 5 A's Customer Journey Framework is a way of depicting the key interactions throughout the end-to-end customer lifecycle. It is an engaging framework used to organise the key stages a customer goes through as they become aware of your organisation right through to exiting or extending the relationship.

This alternate approach to Customer Journey Mapping helps organise the themes for analysis through both the eyes of the Customer (above the line) and your organisation (below the line) – exploring key touch points, systems, processes, pain points and opportunities.

THE 5 A'S



Qualtrics 5A's Customer Journey Mapping Framework

BENEFITS

The 5 A's is a tool widely used across Qualtrics to communicate the end- to-end customer experience from the lenses of the customer and the organisation. Through framing each stage in the journey into the 5 A's, the 5 A's framework creates a new way of approaching the customer journey and yields a different set of results to a traditional Customer Journey Map.

METHODOLOGY

To complete your Customer Journey Map using Qualtrics 5 A's framework:

1. Develop a template starting with a simple grid. In each of the boxes on the horizontal axis, list the 5 A's in order: Attract, Accept, Adopt, Amplify, Advance
2. Develop two rows, one with your company name, and the other for your customer. Within each row there should be a number of swim lanes.
3. Determine the number of swim lanes based on the number of themes you wish to analyse. For example, common themes are to determine the customer steps, touchpoints, moments of truth, pain points and opportunities. For your organisation, include backend processes and systems, measures / targets, and listening posts to collect feedback and close the loop.

Qualtrics 5A's Customer Journey Mapping Framework

4. Next, map out each detailed step the customer goes through as they progress through each 'A'. Map the end-to-end experience through both the eyes of the Customer (above the line) and your organisation (below the line)
5. Finally, identify any gaps or assumptions and validate these with customers and the wider business.

Qualtrics 5A's Customer Journey Mapping Framework

	ATTRACT	ACCEPT	ADOPT	AMPLIFY	ADVANCE
1. THE JOURNEY	Do What are the steps the customer takes in the journey?				
	Think What are they thinking?				
2. YOUR CUSTOMERS	Feel What are they feeling? (Positive ☺, Negative ☹)				
	Pain points What are the potential customer pain points?				
	Opportunities What are the opportunities to differentiate?				
3. YOUR ORGANISATION	Channels How are customers interacting with the organisation (Systems/teams)?				
	Pain Points What are the pain points for your people?				
	Opportunities What are the opportunities to improve for your people?				
	Listening Posts What are the current and planned listening posts?				

PART 3

Building the Future State Experience

5 Why's

TIP

Challenge whether your root cause matches your focusing challenge.

OVERVIEW

The 5 Why's is a simple, yet powerful problem solving tool that works to engage teams in understanding the root cause of simple issues.

The root cause is the underlying factor at the heart of your challenge. It is important that we address the root cause as it is often what is causing systemic issues.

BENEFITS

The 5 Why's tool will help you to identify where you need to further investigate. Once you have identified your root cause, you still need to prove or disprove it using data. When you investigate you might find that it's not what you thought. Don't be afraid to re-run the exercise to ensure you are working on the root cause of the issue, before you start to solve for it.

5 Why's

METHODOLOGY

- Start by writing down a specific problem statement or pain point your team is trying to solve.
- Gain agreement amongst the group that this is the focus of the challenge.
- Ask the question of 'why' the problem occurs and write down the answer below the problem.
- Keep using the why question to the previous answer, until you get to the real cause of the problem.
- It may take more or less than five 'whys' to get to the real cause of the problem.

5 Why's

PROBLEM STATEMENT

WHY?

WHY?

WHY?

WHY?

WHY?

Brainstorming

OVERVIEW

Brainstorming is a structured technique used to apply a different way of thinking to generate and explore new ideas. Brainstorming is traditionally done as a collaborative effort, by bringing together the right people with the right knowledge to help solve your problem.

TIP

Use post-it notes to easily record/move ideas around!

To get the most out the session and the people involved, brainstorming works best when you first apply divergent thinking without limitations, then converge on appropriate ideas to explore in more detail. This means considering all angles, before narrowing on designing a solution that best meets the needs of your customers.

Brainstorming

FOUR BRAINSTORMING APPROACHES

CLASSIC Generate as many ideas as possible
Agree a scoring approach and score all

WHAT IF? Ask “what if” three times
For example, for a problem of high customer turnover ask “what if we halved the price?”

WRONG WAY Deliberately try to generate bad ideas
For example, if you were trying to improve customer retention, ask “what could we do to drive our customers away?”
Concentrate on the issues that matter most, and thus generate better ideas

RISKY OPTIONS Offer a prize for the riskiest idea
People are often discouraged from suggesting seemingly wild or risky ideas which might lead to the best solution because they fear failure or group criticism

Brainstorming

BENEFITS

Brainstorming facilitates divergent thinking to think outside the box and help design the right solutions for customers. It is a useful exploration tool, and when done in combination with a customer journey map it can be an effective way to assess pain points, and develop new opportunities for your future state design.

METHODOLOGY

To facilitate your brainstorming session:

- Invite a diverse group of people to participate to bring fresh perspectives and ideas
- Appoint a facilitator to guide the discussion
- Reserve 45 – 60 minutes per brainstorming session to maintain energy and momentum
- Begin the session with a well-defined topic or Focusing Challenge
- Select one of the four brainstorming approaches; Classic, What if, Wrong way or Risky options
- Develop and jot-down as many new ideas as possible
- In the last 15 minutes cluster similar ideas

Brainstorming

- Vote for the favourite idea: people make their choice in silence then vote with sticky dots
- Count the votes and discuss the results
- Prepare to select ideas for further development
- Be mindful not to lose sight of your challenge. Make sure you keep coming back to what matters most to the customer
- If time permits, try using another one of the Four Brainstorming Approaches for a different set of results

Brainstorming

Classic

Generate as many ideas as possible

Agree a scoring approach and score all

What if?

Ask “what if” three times

For example, for problem of high customer turnover ask “what if we halved the price”

Wrong way

Deliberately try to generate bad ideas

For example, if you were trying to improve customer retention, ask “what could we do to drive our customers away?”

Concentrate on the issues that matter most, and thus generate better ideas

Risky options

Offer a prize for the riskiest idea

People are often discouraged from suggesting seemingly wild or risky ideas which might lead to the best solution because they fear failure or group criticism

Experience Design Development

TIP

When assessing each opportunity ensure that you prioritise balancing customer need with effort required to implement.

OVERVIEW

The experience design process is a method to further develop initiatives subsequent to your Customer Journey Mapping and opportunities Brainstorming Session. The experience design process sanitises ideas to ensure feasibility and benefit of the opportunities to both the customer and the business, and helps frame the opportunities into workable initiatives.

The experience design process is iterative and progresses ideas once proven. This agile process ensures unproven ideas are stopped and retired, and viable ideas are further developed into a business case to incite action.

BENEFITS

The experience design model is a process to refine ideas and transform initiatives into meaningful customer experiences which are practical for your organisation. The steps outlined in the model are also a valuable way to use design thinking practices to progress opportunities from your Customer Journey Mapping session into reality.

Experience Design Development

METHODOLOGY

1. Define and understand the opportunities for improving the customer experience from the Brainstorming Session
2. Individually or as a group run each opportunity through the Experience Design Development tool (we believe/will solve) to further develop the opportunity
3. Then rank each opportunity in terms of its customer and business value using the prioritisation framework – placing each opportunity onto the 4 quadrant tool
4. As a group, discuss each validated opportunity then assess each against the customer and business value using the prioritisation framework
5. Filter out opportunities with no customer experience or business value
6. Delegate initiatives to stakeholders responsible for delivery
7. Develop a business case for each initiative to confirm value to the customer and organisation
8. For the successful initiatives, experiment and co-create using real people and real situations harnessing diverse points of view
9. Test, iterate, review and improve the initiative. Use data to inform continuous improvement and to identify unmet needs and new opportunities

Experience
Design
Development

We believe _____

DESCRIBE THE NEW EXPERIENCE

Will solve _____

**CUSTOMER NEEDS & ORGANISATION'S
ISSUE/OPPORTUNITY**

Enabled by _____

**FULL SOLUTION: PEOPLE + PROCESSES
+ TECHNOLOGY**

Resulting in _____

NEW ATTITUDE > BEHAVIOUR > RESULT

Experience Design Prioritisation



1. **Rank each area** based on customer and business value

CUSTOMER VALUE PRINCIPLES

Impact

- Targets priority customer segments
- Delivers a meaningful CX change
- Impacts strategic CX drivers

Scale

- Impacts a high % of customer base

Timing

- Balances long-term vs short-term changes to the customer experience

BUSINESS VALUE PRINCIPLES

Feasible

- Considers impacts to People, Process, Technology

Viable

- Improves Differentiation, Acquisition, Retention, Efficiency

2. **De-prioritise areas** with low customer experience and business value

CUSTOMER EMPLOYEE PRODUCT BRAND CUSTOMER EMPLOYEE PRODUCT BRAND CUSTOMER EMPLOYEE PRODUCT BRAND



Learn more at qualtrics.com