Experience Blueprinting:

Bringing your Customer Journey Maps to Life with Execution-Ready Customer Experience Blueprints

Presented by:

John Gusiff
CX Innovation and Design
McorpCX

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Your Presenter: John Gusiff

CX Innovation and Design, McorpCX

- Passionate about reducing or eliminating customer sacrifice (settling for poorly designed experiences)

- Focused on helping companies turn Customer Insights into Action thru new and improved Customer Experiences

- Life-long learner on the methods and techniques for leading CX innovation and design initiatives

- Has worked with leading Brands across industries including Gap, lululemon athletica, American Honda, eBay, Disney, and Sprint

Helping the companies we work for do these three things:

Understand Their Customers

Improve Customer Experiences

Build Customer-Centric Capabilities

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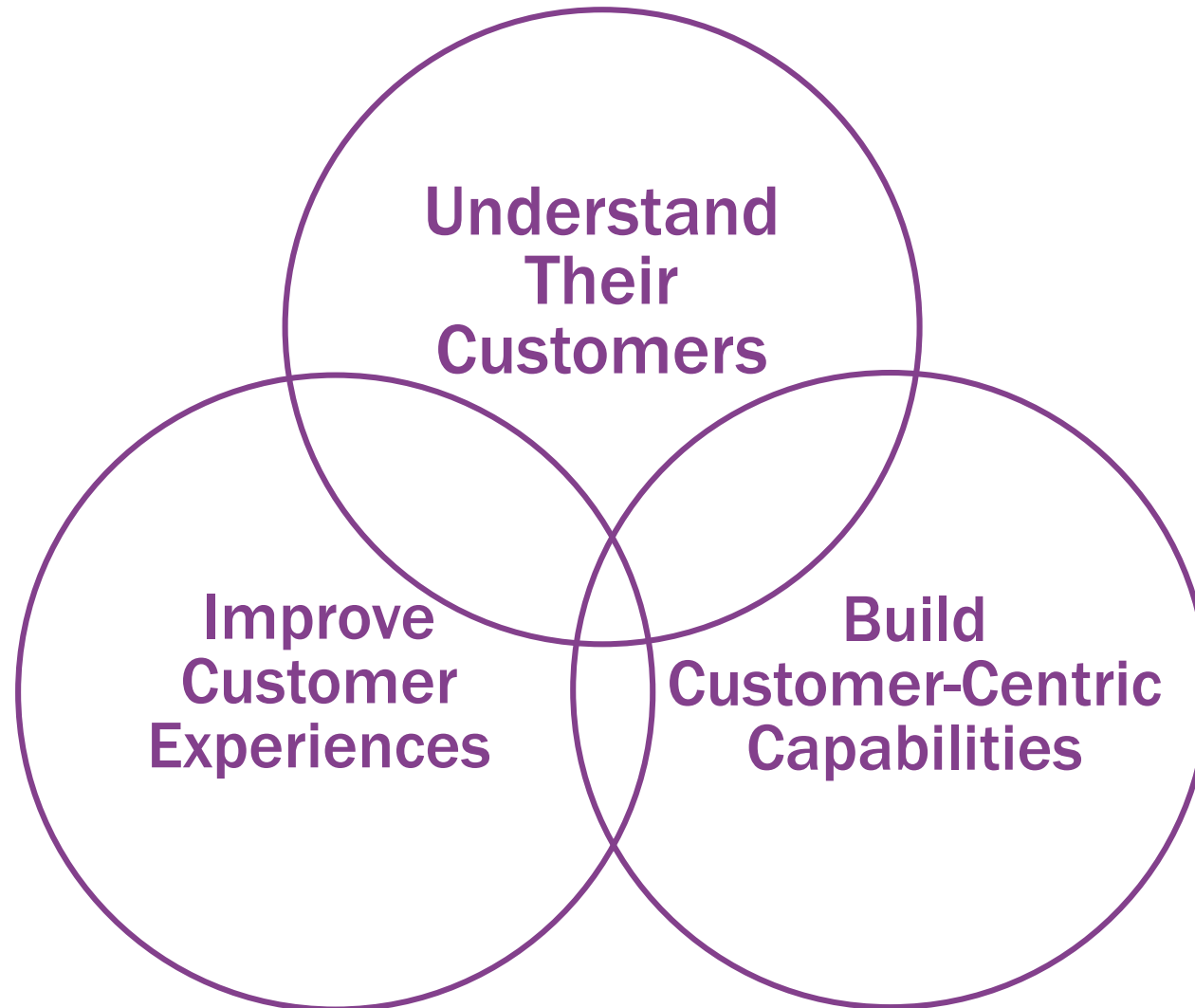
We advise across industries with leading brands

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Experience strategy, design and process leaders since 2002

Media recognition for thought leadership

Bloomberg Businessweek

CNBC

FAST COMPANY

TIME

THE HUFFINGTON POST

Harvard Business Review

Best-selling book on digital innovation

"Read it and heed it, folks, because it just doesn't come any more direct or compelling than this!"
— Don Peppers and Martha Rogers, authors of EXTREME TRUST: Honesty as a Competitive Advantage

SMART CUSTOMERS STUPID COMPANIES

WHY ONLY INTELLIGENT COMPANIES WILL THRIVE, AND HOW TO BE ONE OF THEM

MICHAEL HINSHAW   BRUCE KASANOFF
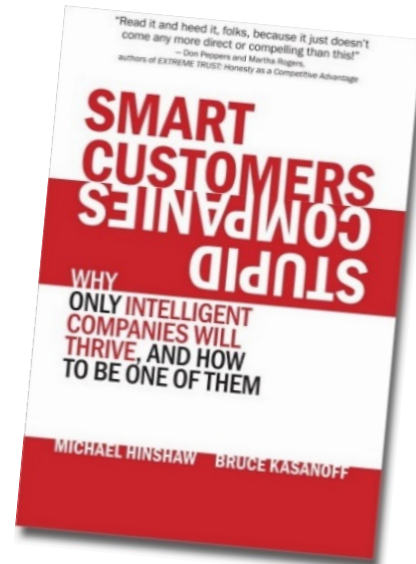
"One of the most exciting business books I've ever read."

- Don Peppers
Founder, Peppers & Rogers

Analyst Recognition as one of 15 global customer experience consultancies

FORRESTER

Enterprise Customer Experience Transformation Consultants
by Megan Burns, June 14, 2012

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Today, we're going to: Level set: Why journey map again? Discuss: Barriers to implementing journey maps. Define: What an experience blueprint is. Show: How to transition to experience blueprints, and how to use them to fail fast and learn.

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In a world of radically changing customer expectations, there is only one sustainable competitive advantage:

Deliver a better customer (employee, partner, etc.) experience - across all channels and interactions

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Giving customers the experiences they want requires "seeing" the journey through her eyes, and doing so across…

Devices and Channels

Different Segments

Discover

Advocate

Consider

Engage

Buy

Interactions

Use

Journeys

Outside-in journey maps are driven by customer perceptions
Research based persona and maps bring customers and their journeys to life

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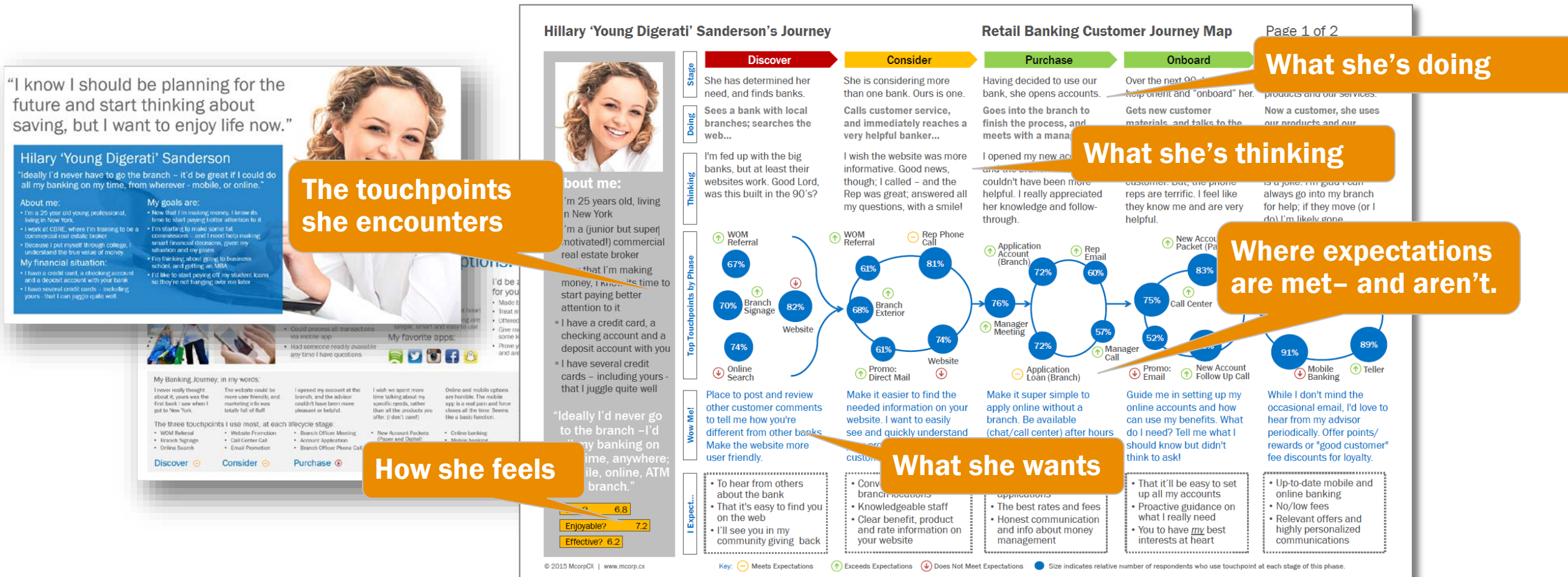
This requires an outside-in view of the customer experience

Customer Perspectives of their experience
(An outside-in view of the journey)

| Discover | Consider | Buy | Use | Engage | Advocate |
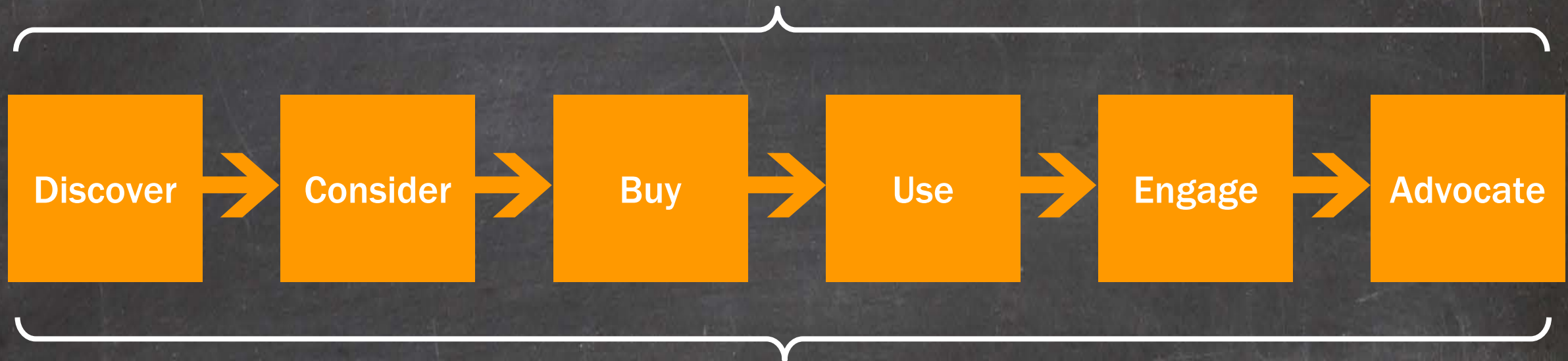
Internal view of people, processes, information and technology
(Aligned to customer journey)

And an inside-out view of and alignment to enabling systems

In our mobile-first, omni-channel, digitally-driven world… technology, systems and customer needs must align.
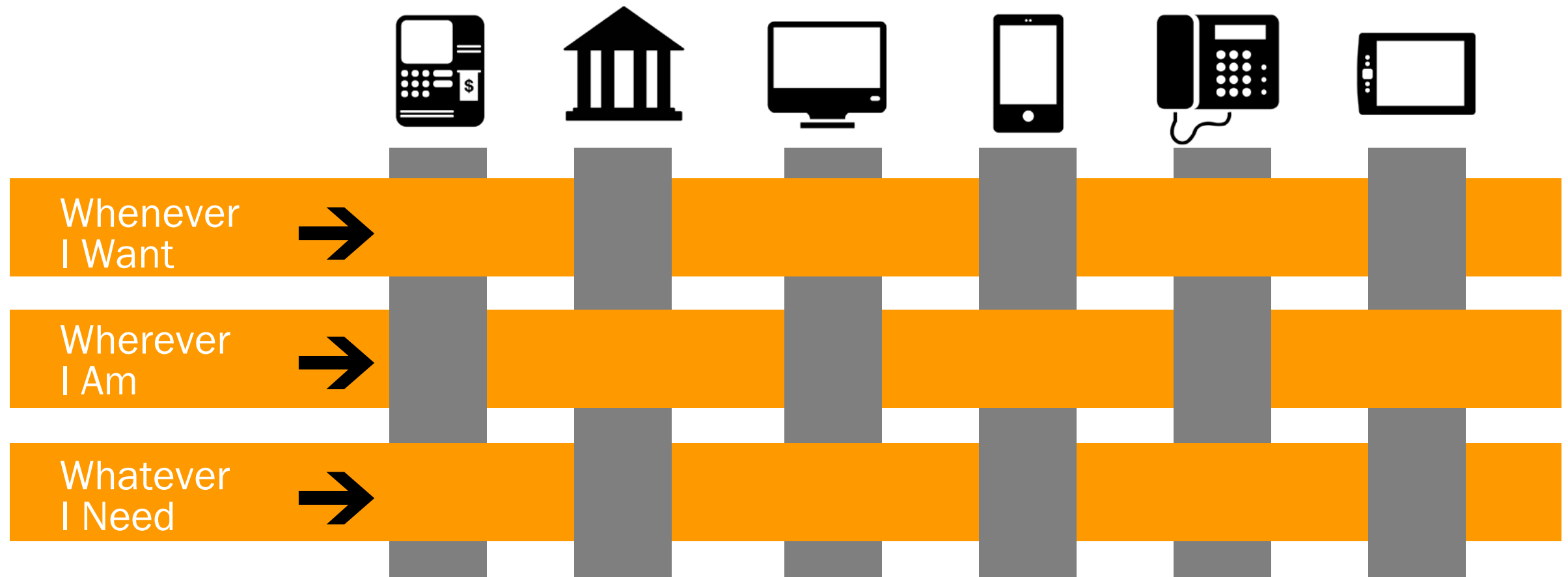
Whenever
I Want →

Wherever
I Am →

Whatever
I Need →

Today, we're going to: Level set: Why journey map again? **Discuss: Barriers to implementing journey maps**. Define: What an experience blueprint is. Show: How to transition to experience blueprints, and how to use them to fail fast and learn.
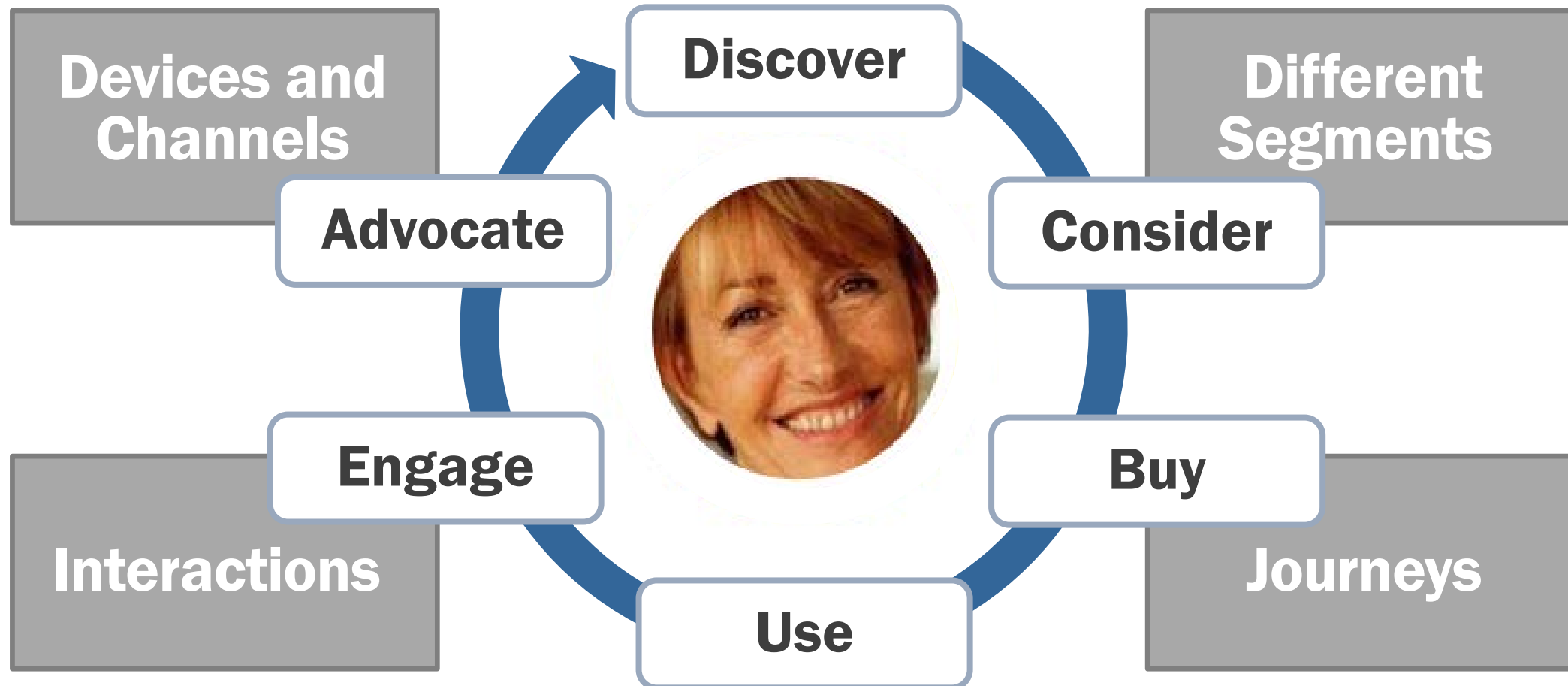
Barriers to implementing Journey Maps

What are some of the barriers to bringing you Journey Maps to Life

To get from here to here...

And from here to here...

Experience Strategy	Outside Customer Understanding	Experience Design	Prototype, test and iterate	Implement. Monitor and Improve
Align strategies, prioritize and validate issues	Articulate member wants, needs, journeys and gaps	Design services, products and experiences	Test designs with your members and your people	Align systems and resources, and go to market
Strategy alignment, design frameworks and business cases	Primary and secondary research and analytics	Hands-on workshops, wireframes, and experience blueprints	Plan, iterative and improve	Launch, monitor, learn and scale

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Four main Barriers to implementing Customer Journey Maps

Despite the many reasons for improving CX several barriers are often in your way

Driving Forces for improving CX:

Key barriers to improving CX:

The Era of Smart Customers

Customers are indifferent & disloyal

CX drives measurable value

IMPROVING CX

#1 The Knowing-Doing Gap

#2 Not knowing where to start

#3 Organizational mis-alignment or silos

#4 No post-journey mapping methodology

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Barrier #1 - The Knowing-Doing Gap

The challenge of turning knowledge about where to improve CX into action
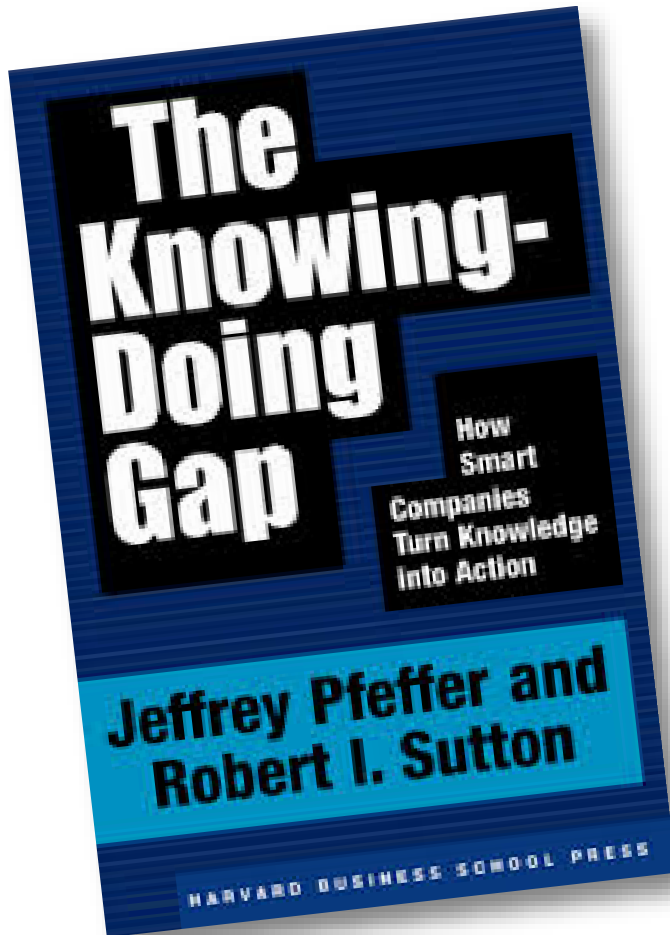
The Knowing-Doing Gap:

"Why are there so many gaps between what firms know they should do and what they actually do?

"Why do so many companies fail to implement the experience and insight they've worked so hard to acquire?"

- Talk and Action
- Memory and Thinking
- Fear and Knowledge
- Measurement and Judgment

Step 1 → Step 2 → Step 3 → Step 4 → Step 5

Barrier #2 – Not knowing where to start

There are several sub-journeys which tie together multiple touchpoints

| Discover | Consider | Buy | Use | Engage | Advocate |

Channel Performance

- Mobile
- Website
- Call Center
- Retail Store
- Social Media

◇ Touchpoint   ◆ Meets Expectation   ◆ Under-performing   ◆ Pain Point
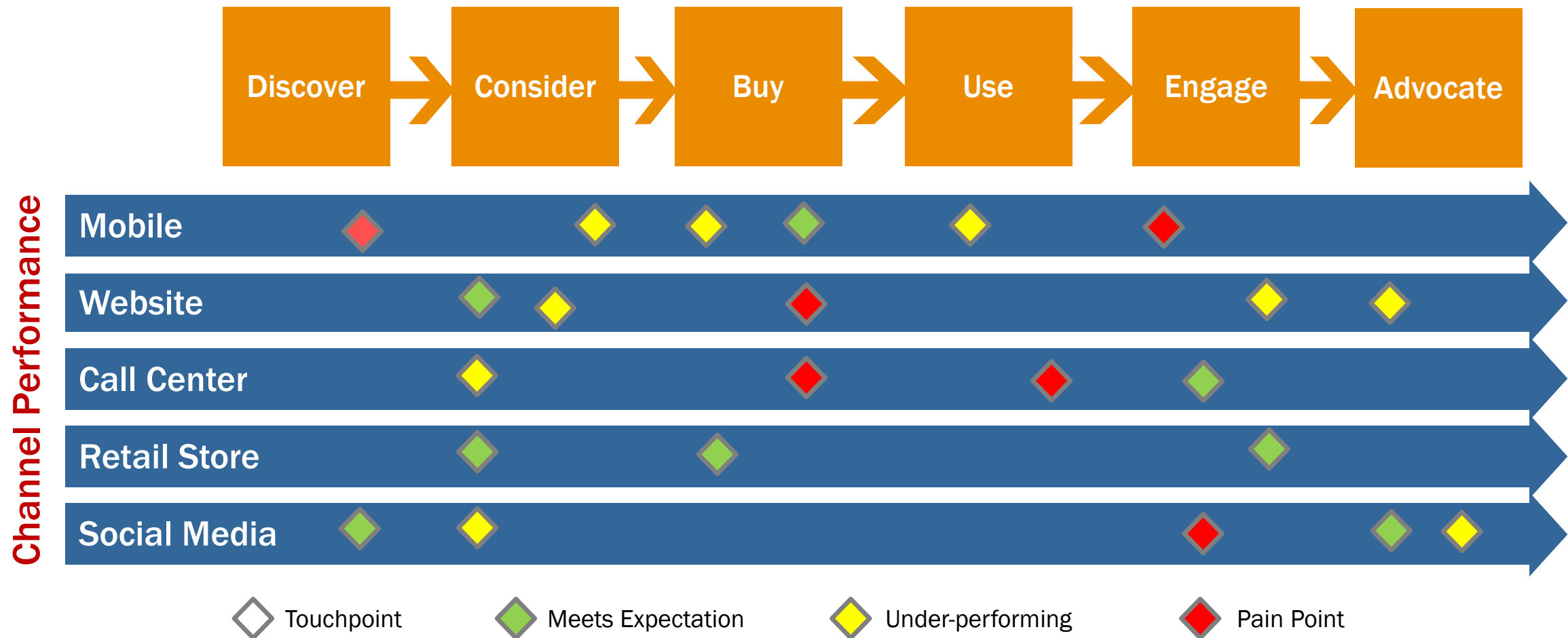
Barrier #3 – Organization mis-alignment or silos

Difficulty building organizational alignment on "where" and "what" to change to improve customer experience

| Discover | Consider | Buy | Use | Engage | Advocate |

| Marketing | Sales | Operations | Services | Support |

Each function within an organization…

**Often has its own objectives, measures of success
and ideas on how to best serve their customer.**

**Resulting in a fractured experience for customers as they traverse the journey
stages that are "owned" or "managed" by different parts of the organization**

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Barrier #4 – No post-journey mapping methodology

Lacking a method to transition Customer Insights to Experience Design

To get from here to here...

And from here to here...

Experience Strategy	**Outside Customer Understanding**	**Experience Design**	**Prototype, test and iterate**	**Implement. Monitor and Improve**
Align strategies, prioritize and validate issues	Articulate member wants, needs, journeys and gaps	Design services, products and experiences	Test designs with your members and your people	Align systems and resources, and go to market

Strategy alignment, design frameworks and business cases

Primary and secondary research and analytics

Hands-on workshops, wireframes, and experience blueprints

Plan, iterative and improve

Launch, monitor, learn and scale

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Experience Blueprinting – Staging Experiences

Experiences don't just happen, at least the good ones, they are staged!
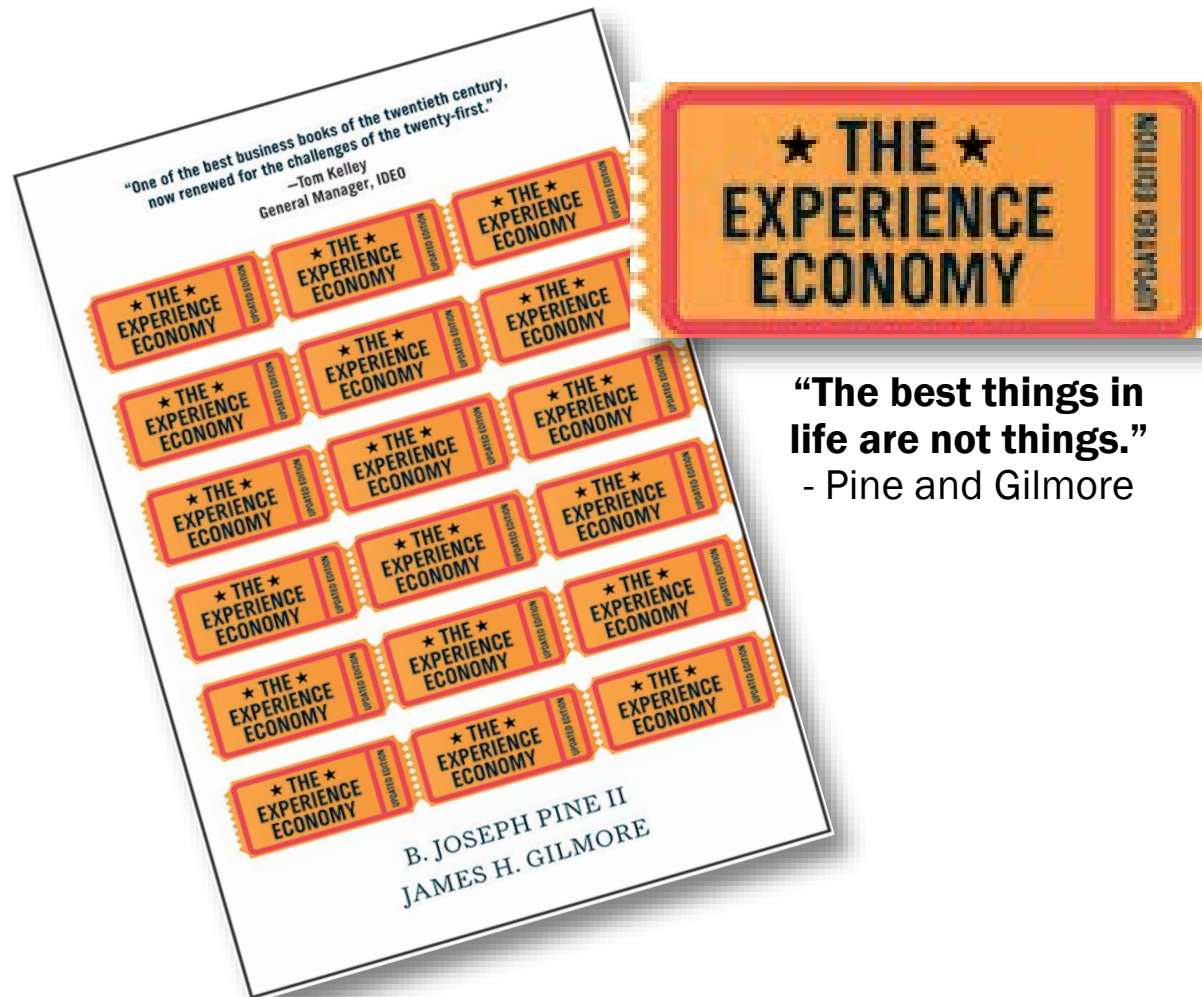
"The best things in
life are not things."
- Pine and Gilmore

Audience

Performance

Theater

Script

Drama

Strategy

Processes

Work

Offerings
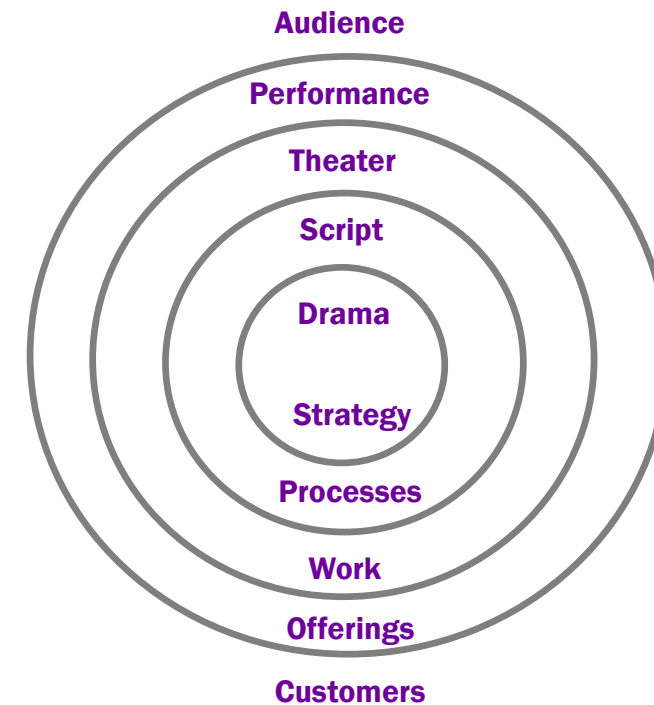
Customers

The Enactment Model

Experience Blueprinting – The Principles

There are five core principles to experience design you must address

| 1 | Customer-centered | Services should be experienced through the customer's eyes. |

| 2 | Co-creative | All stakeholders should be included in the service design process. |

| 3 | Sequencing | The service should be visualized as a sequence of interrelated actions. |

| 4 | Evidencing | Intangible services should be visualized in terms of physical artifacts (e.g., touchpoints). |

| 5 | Holistic | The entire environment of a service should be considered. |

This is Service Design Thinking, Marc Stickdorn and Jacob Schneider

Experience Blueprinting – The Artifact

Schematic diagram that represents both customer & organizational perspectives

"The blueprint is an <u>operational tool</u> that describes the nature and the characteristics of the service interaction in <u>enough detail to verify, implement and maintain it.</u>"

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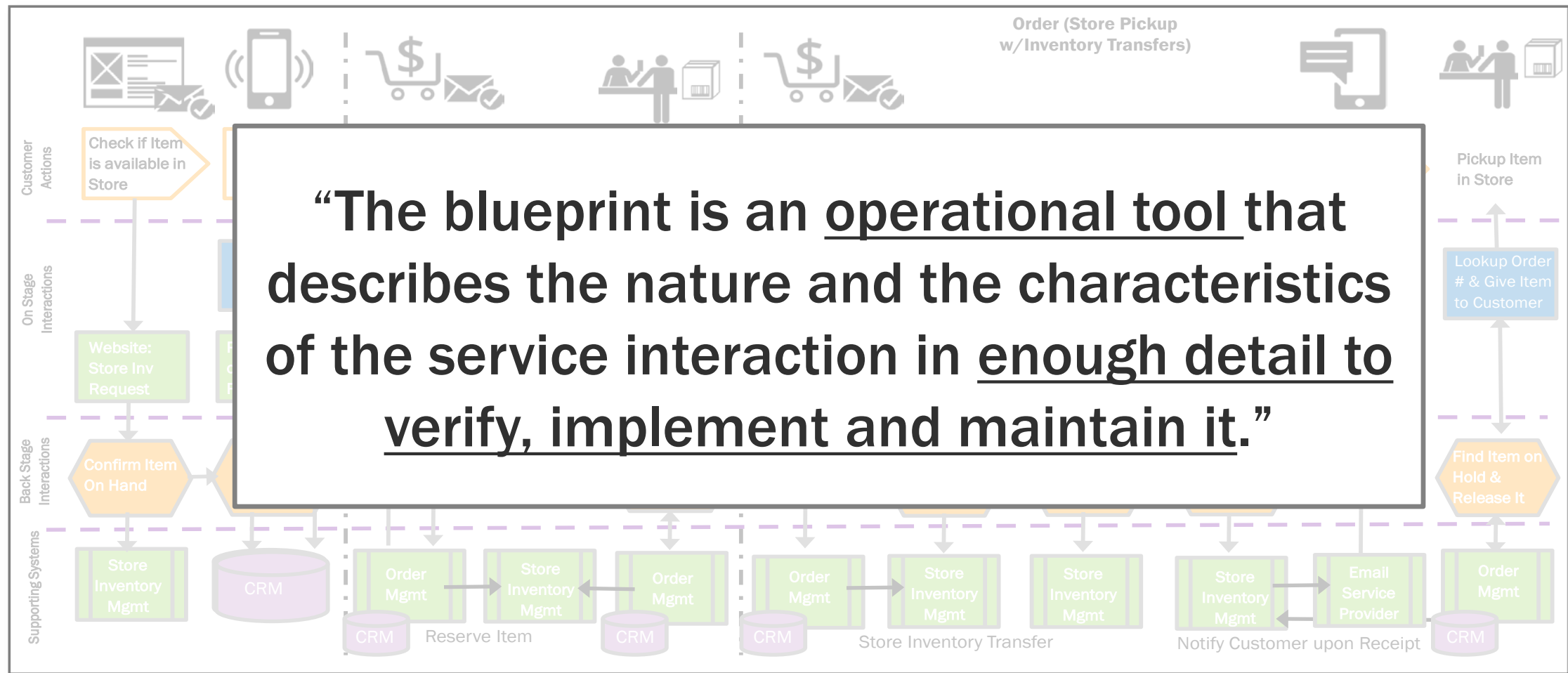
Experience Blueprint – When and why are they useful?

When you need to get alignment on everyone's role in executing an experience

1.

Improve Existing Service

You want to improve an existing service offering to address a specific pain point

2.

Expand an Existing Service Offering

You want to breakup or extend an existing service into one or more service offerings

3.

Design an Omni-Channel Experience

You are designing an experience that is complex in that it spans multiple touchpoints and/or channels of interaction

4.

Design an Experience across Suppliers

You are designing an experience that requires coordination across multiple partners and/or suppliers

There are different 'kinds' of experience improvement...
The ultimate goal? To reduce "friction" between you and your customers.
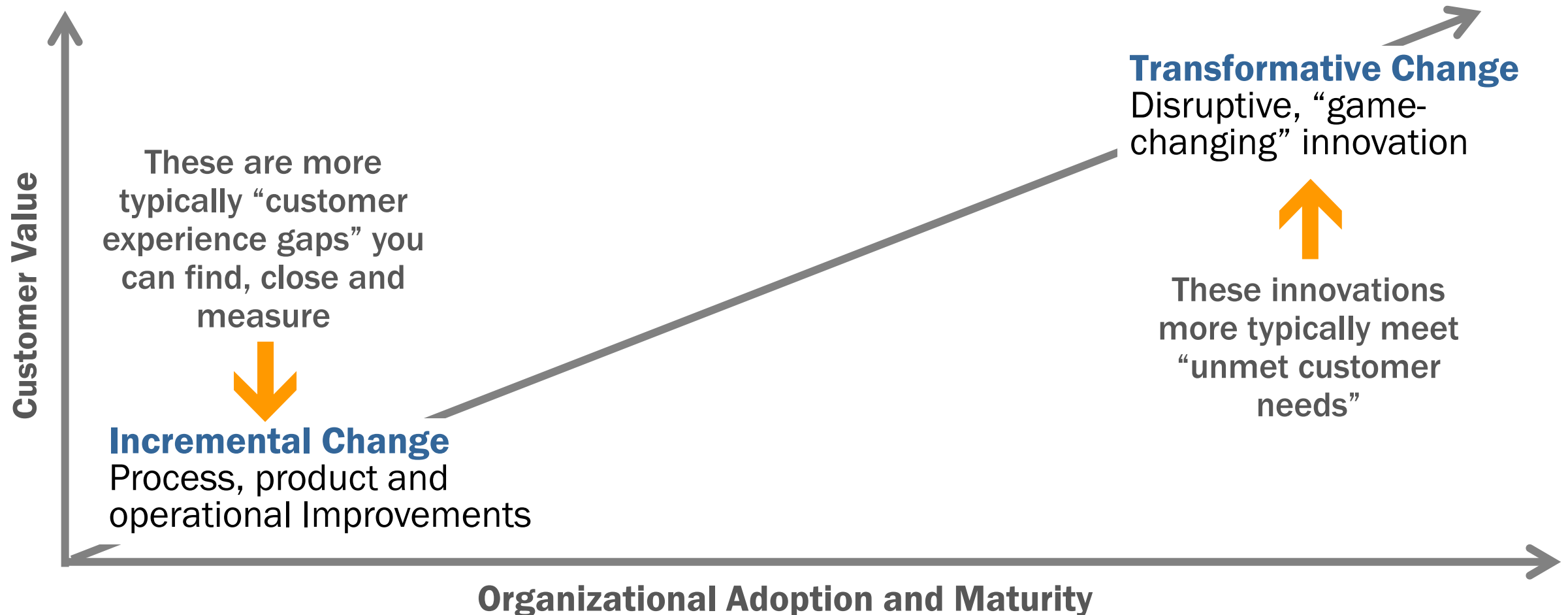
Customer Value

These are more typically "customer experience gaps" you can find, close and measure

Transformative Change
Disruptive, "game-changing" innovation

These innovations more typically meet "unmet customer needs"

Incremental Change
Process, product and operational Improvements

Organizational Adoption and Maturity

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Today, we're going to: Level set: Why journey map again? Discuss: Barriers to implementing journey maps. Define: What an experience blueprint is. Show: **How to transition to experience blueprints**, and How to use them to fail fast and learn.

Experience Blueprinting – The Method
Bridging the transition from Experience Context through Experience Design

Outside-In Customer Understanding

Experience Design

Prototype, test and iterate

From context to design...

And design to execution...

Articulate customer wants, needs, journeys and gaps

Design service products and experiences

Test designs with your customers and your people

UX   CX

Operations

Primary and secondary research and analytics

Hands-on workshops, wireframes, and experience blueprints

Plan, iterative and improve

Transitioning from Journey map to Experience blueprint
Steps to getting started from selecting sub-journey to building blueprint

Focus on a specific problem or pain point

Ideate around Initial Solution Concept

Build Blueprint

What?

| 1. Select Sub-journey | 2. Revisit Experience Context | 3. Ideate on Solution Concepts | 4. Determine Initial Solution Concept(s) | 5. Build an Experience Blueprint |

Who?

Core CX Design Team

Extended CX Design Team

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Step 1 → Step 2 → Step 3 → Step 4 → Step 5
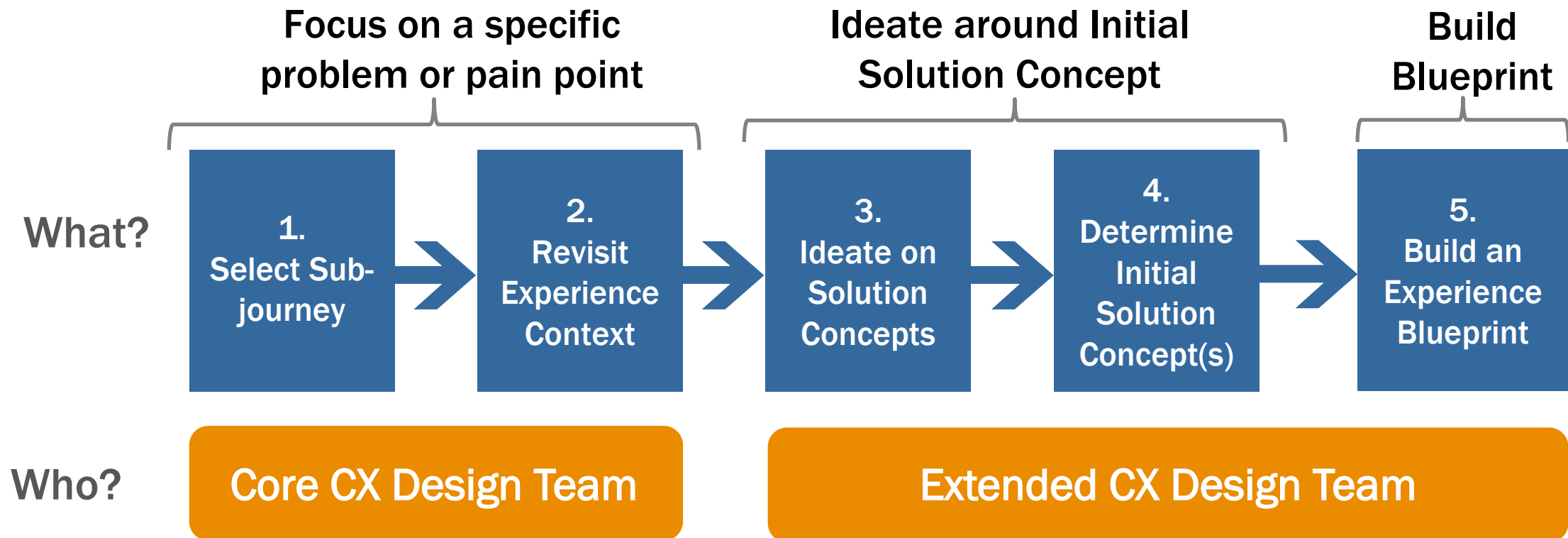
Step 1 – Select a sub-journey (pain point to address)
There are several sub-journey's which tie together multiple touchpoints

Discover → Consider → Buy → Use → Engage → Advocate

Channel Performance

- Mobile
- Website
- Call Center
- Retail Store
- Social Media

Scenario:
Out of Stock
on Website

◇ Touchpoint   ◆ Meets Expectation   ◆ Under-performing   ◆ Pain Point

Step 1 → Step 2 → Step 3 → Step 4 → Step 5
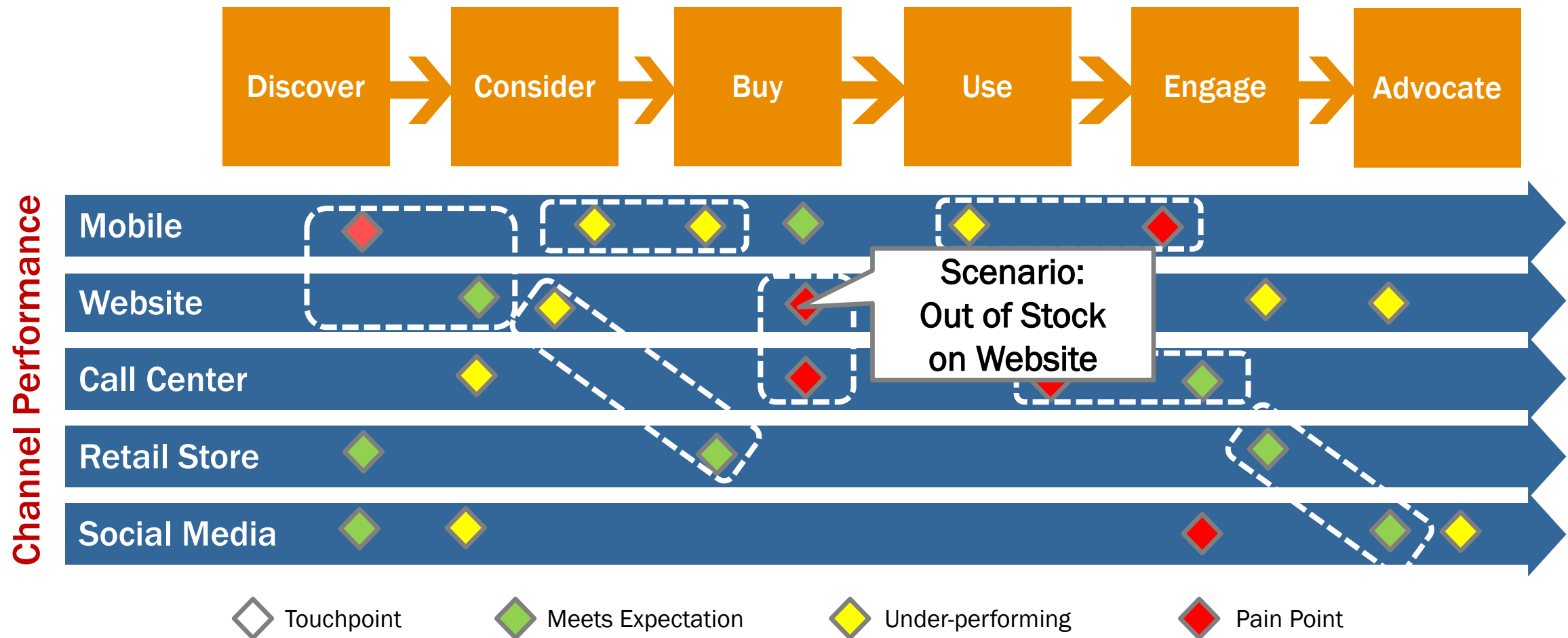
Case Study: Brick & Click Retailer

Mike, representing targeted customer segment unable to acquire items selected

Kitchen Remodel

2 Pendant Lights

one day...
the kitchen sink

Meet Mike.

Customer Pain Point — Out of Stock on Website

Mike, in the midst of a kitchen remodeling project. He has been unable to successfully purchase two pendant lights which he and his wife have selected for their kitchen island.

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Step 1 → Step 2 → Step 3 → Step 4 → Step 5

Step 1 - Select a Sub-journey (to achieve customer goal)

Select a sub-journey that determines solution boundaries, defined by customer goal

A sub-journey is a subset of the broader experience

Discover → Consider → Buy → Use → Engage → Advocate

Channel Performance

Mobile
Website
Call Center
Retail Store
Social Media

Scenario: Out of Stock on Website

Customer Pain Point

Out of Stock on Website

Check if Item Available in Store → Receive Call from Store → Place Order → Receive Notice from Store → Pickup Item in Store

Item in Hand

Customer Goal

Sequence of Customer Actions

Step 1 → Step 2 → Step 3 → Step 4 → Step 5

Step 2 - Revisit Experience Context for sub-journey

For the sub-journey selected, revisit what the customer is "feeling" and "thinking"?

Thinking:

They say it is on back-order, not clear when it will be in stock again though.

Maybe they have it in Stock at one of their stores?

I wonder if they have a Store near my work location?

The electrician is going to be here next Monday.

Do I have to pick it up? Or could they ship it from the store?

Doing:

Out of Stock on Website → Check if Item Available in Store → Receive Call from Store → Place Order → Receive Notice from Store → Pickup Item in Store → Item in Hand

Feeling:

Confused *Concerned* *Hopeful*

Frustrated *Worried*

Step 1 → Step 2 → Step 3 → Step 4 → Step 5

Step 3 - Ideate on Solution Concept (Alternatives)

Ideate on solution concepts and determine initial list of questions that need to be answered

UX

CX

Operations

Pickup in Store

Ship from Store

Solution Options

Back Order Fulfillment

Cross-sell alternative item

Reserve in Store

Step 3 - Ideate on Solution Concept (Alternatives)

Ideate on solution concepts and determine initial list of questions that need to be answered

Service Branding

UX

Site Design
Buy Online Pick Up in Store

Store Signage

CX
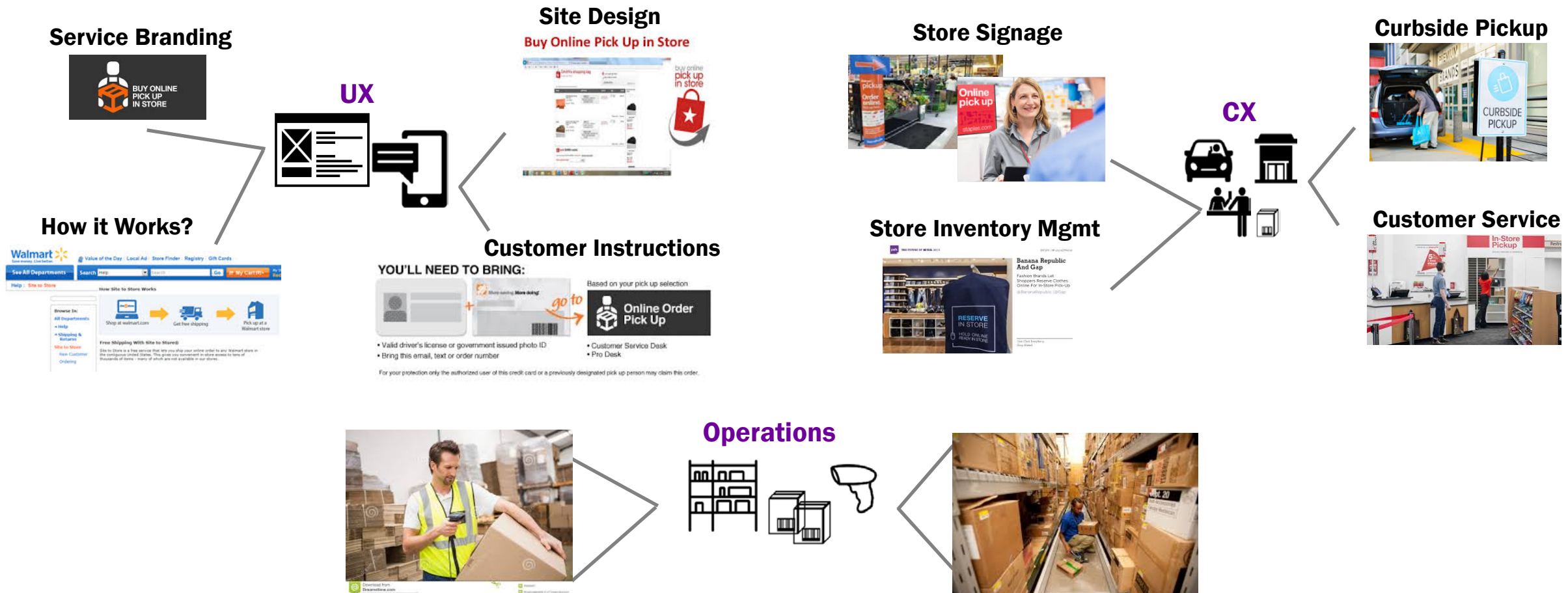
Curbside Pickup

How it Works?

Customer Instructions
YOU'LL NEED TO BRING:

Store Inventory Mgmt

Customer Service

Operations

Step 4 – Determine Initial Solution Concept (Innovation)

There are three lenses thru which you should evaluate each Solution Concept

INNOVATION

VIABILITY

DESIRABILTY

FEASIBLITY

Start here
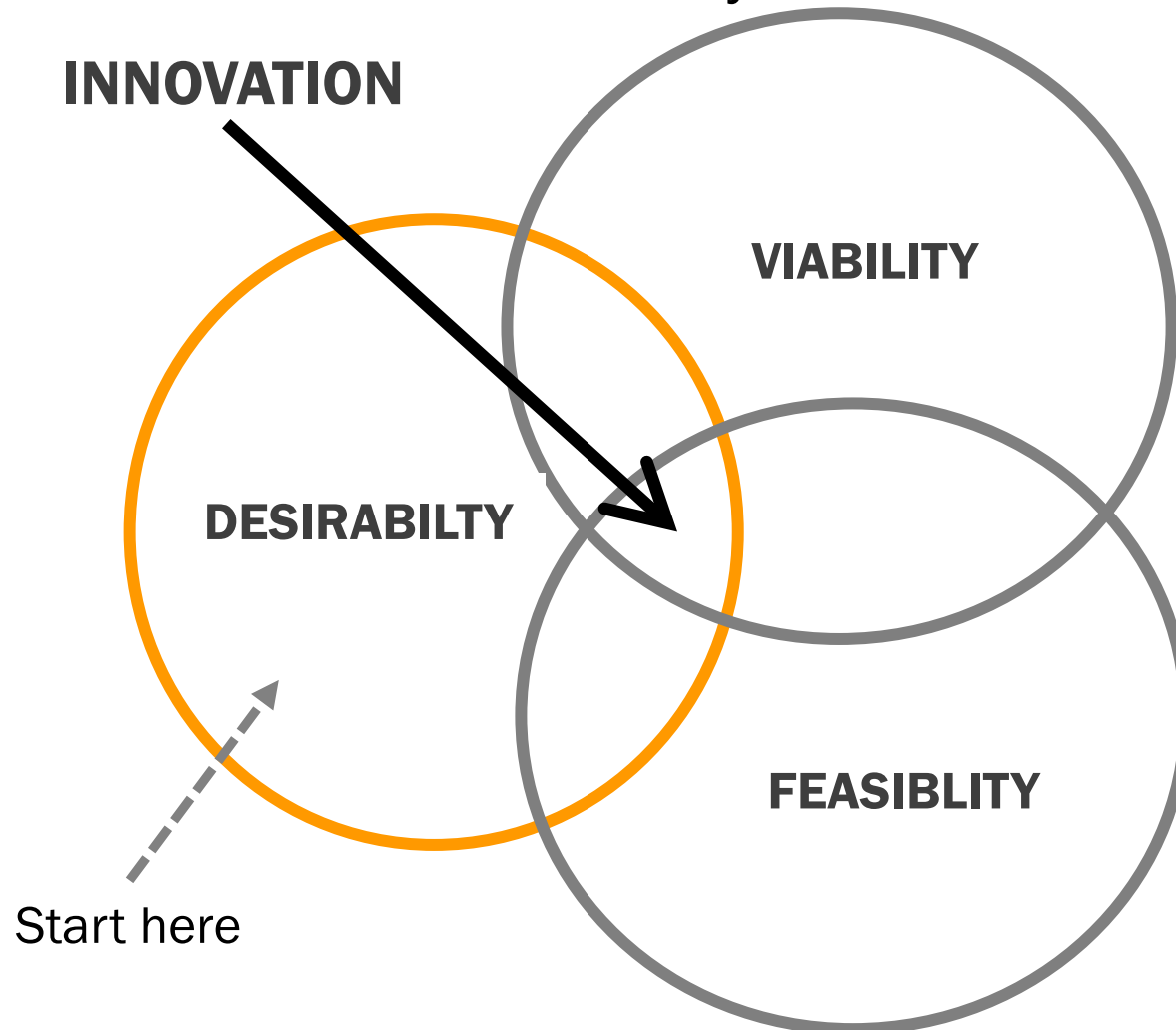
Innovation occurs when you find that "sweet spot"!!

The right balance between desirability, viability, and feasibility.

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Step 1 → Step 2 → Step 3 → Step 4 → Step 5

Step 4 – Determine Initial Solution Concept (Best Option)

Analyze the viability, feasibility, and desirability of the different experience design options

**Desirability
(Guest Loyalty)**

High

Moderate

Low

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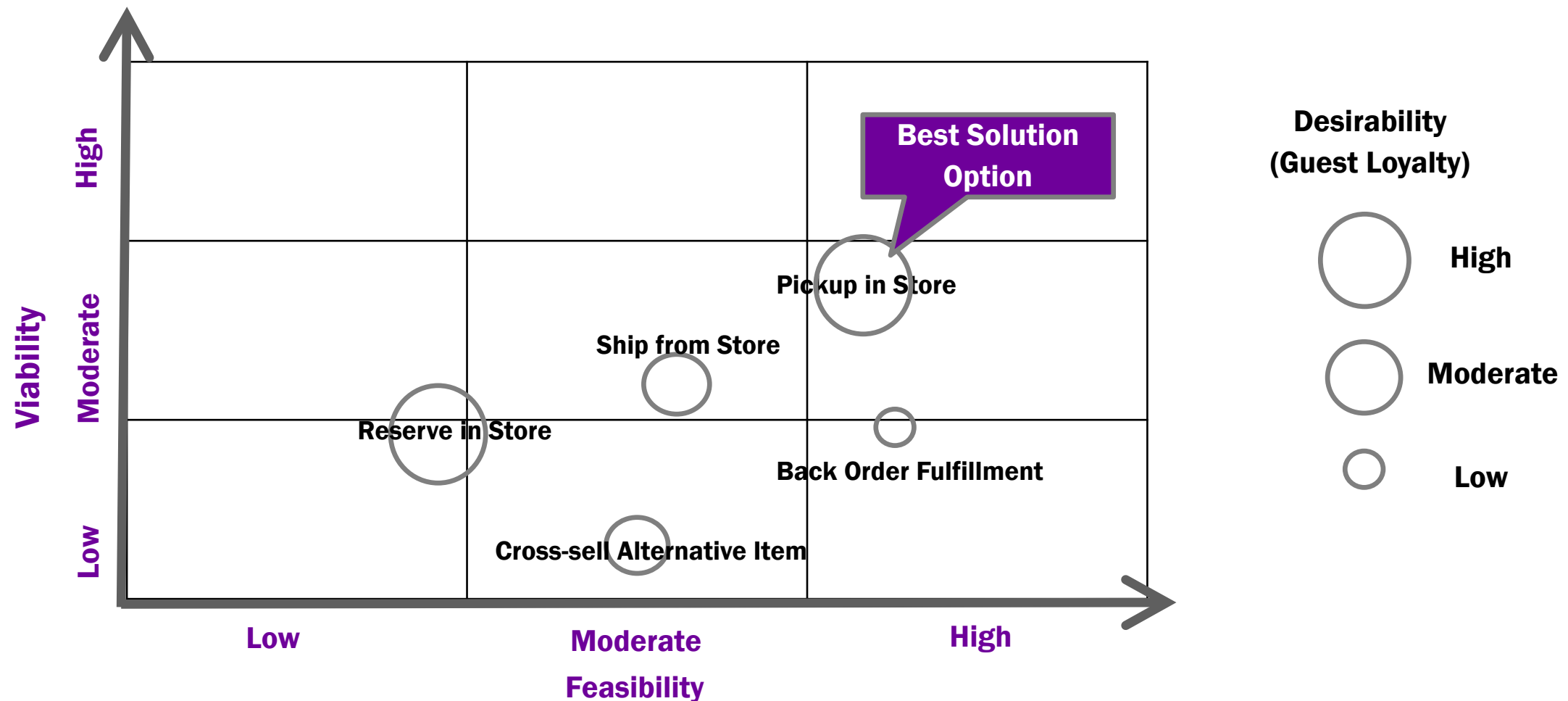Step 1 → Step 2 → Step 3 → Step 4 → Step 5

Step 5 – Build an Experience Blueprint

Touchpoints

Check if Item is available in Store

Receive phone call from Store

Place Order (Store Pickup)

Order (Store Pickup)

Pickup Item in Store

Customer Actions

Follow-up w/ Customer on Item Wanted

Collect Info & Place Order (In Stock)

Lookup Order # & Give Item to Customer

Onstage Interactions

Website: Store Inv Request

POS: Call List of Customer Requests

POS: Place Order with Payment

Backstage Interactions

Confirm Item On Hand

Update Customer Call List

Find Item on Hold

Supporting Systems

Store Inventory Mgmt

CRM

Order Mgmt

Store Inventory Mgmt

Order Mgmt

CRM

Reserve Item

CRM

Experience Blueprint for Pickup in Store

People | Process | Information | Technology

Touchpoints

Order (Store Pickup
w/Inventory Transfers)

Customer Actions

| Check if Item is available in Store | Receive phone call from Store | Place Order (Store Pickup) | Pickup Item in Store | Place Order (Store Pickup w/Transfer) | Receive Notice from Store | Pickup Item in Store |

Order (Store Pickup)

On Stage Interactions

| | Follow-up w/ Customer on Item Wanted | Collect Info & Place Order (In Stock) | Lookup Order # & Give Item to Customer | Collect Info & Place Order (Store Transfer | | Lookup Order # & Give Item to Customer |

| Website: Store Inv Request | POS: Call List of Customer Requests | POS: Place Order with Payment | | POS: Place Order with Payment | | |

Back Stage Interactions

| Confirm Item On Hand | Update Customer Call List | | Find Item on Hold | Transfer Inventory from Store | Transfer Inventory from Store | Receive Inventory in Store | | Find Item on Hold & Release It |

Supporting Systems

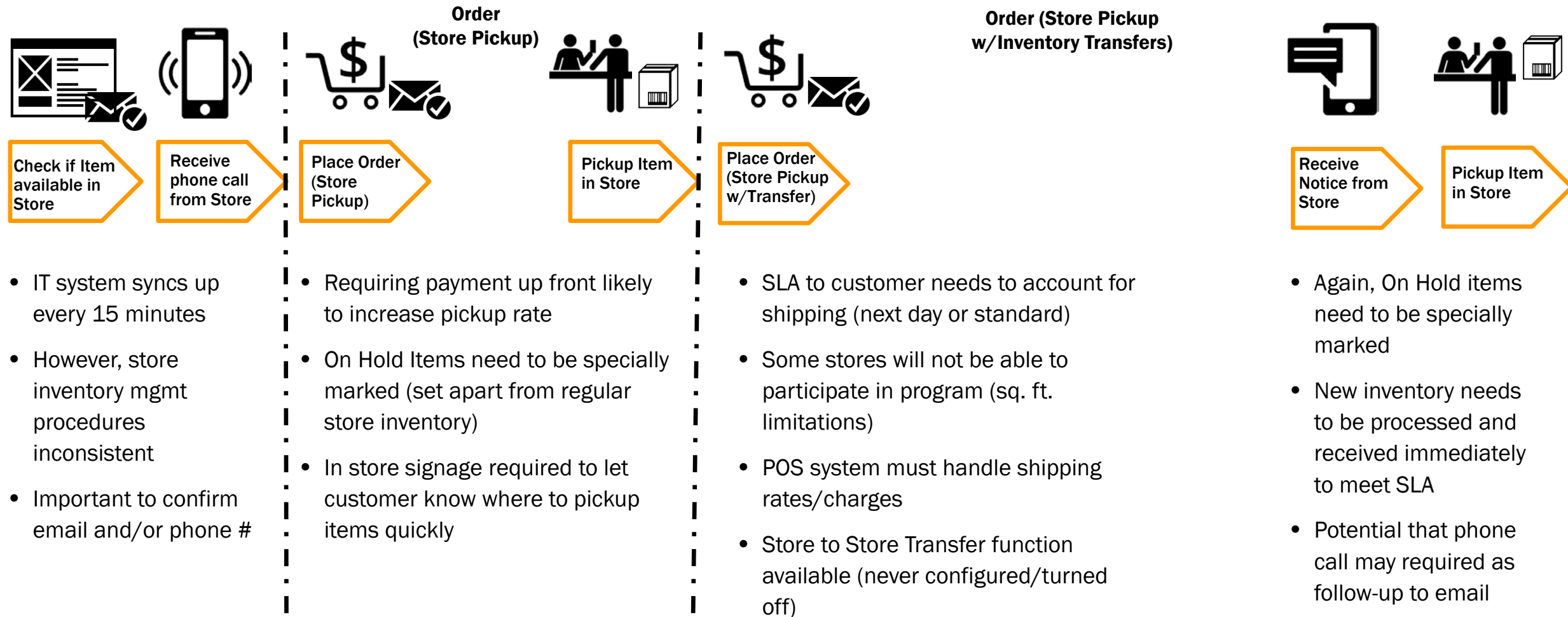| Store Inventory Mgmt | CRM | Order Mgmt | Store Inventory Mgmt | Order Mgmt | Order Mgmt | Store Inventory Mgmt | Store Inventory Mgmt | Store Inventory Mgmt | Email Service Provider | Order Mgmt |

CRM | CRM | CRM | CRM

Reserve Item

Store Inventory Transfer

Notify Customer upon Receipt

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# Fail Fast and Learn from your Experience Blueprints

Bringing cross-functional teams together speeds up the learning cycle (fail fast)

Order (Store Pickup)

Order (Store Pickup w/Inventory Transfers)

Check if Item available in Store

Receive phone call from Store

Place Order (Store Pickup)

Pickup Item in Store

Place Order (Store Pickup w/Transfer)

Receive Notice from Store

Pickup Item in Store

- IT system syncs up every 15 minutes
- However, store inventory mgmt procedures inconsistent
- Important to confirm email and/or phone #

- Requiring payment up front likely to increase pickup rate
- On Hold Items need to be specially marked (set apart from regular store inventory)
- In store signage required to let customer know where to pickup items quickly

- SLA to customer needs to account for shipping (next day or standard)
- Some stores will not be able to participate in program (sq. ft. limitations)
- POS system must handle shipping rates/charges
- Store to Store Transfer function available (never configured/turned off)

- Again, On Hold items need to be specially marked
- New inventory needs to be processed and received immediately to meet SLA
- Potential that phone call may required as follow-up to email

Experience Blueprint – Starting point for Prototyping

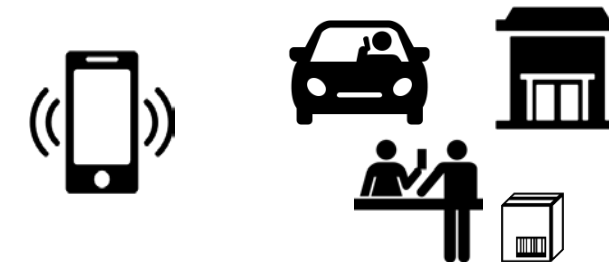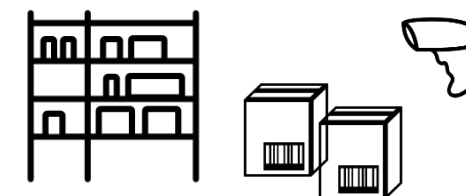Starting point for Iterative Design and Test and Implement activities

Experience Blueprint
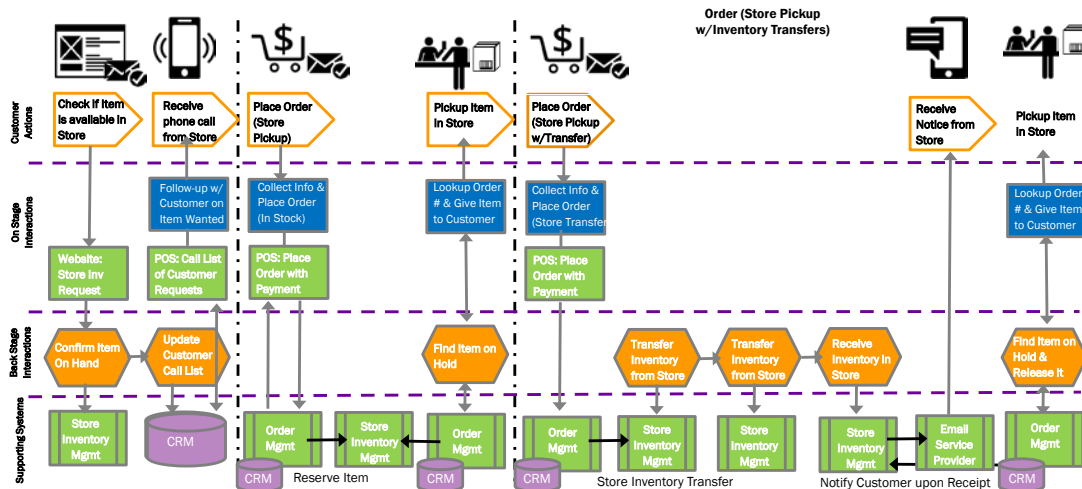
User Experience (UX)
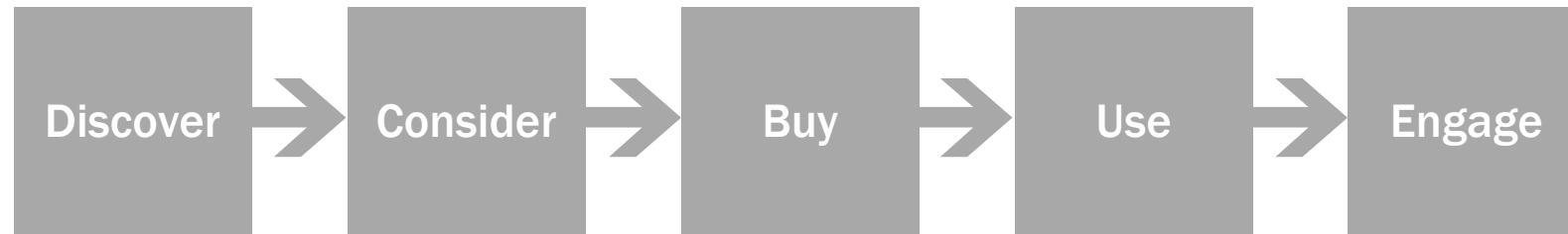
Customer Experience

BackStage Operations

"The blueprint is an operational tool that describes the nature and the characteristics of the service interaction in enough detail to verify, implement and maintain it."

Experience Blueprinting brings Journey Maps to life

By aligning People, Process, Information and Technology

| Discover | → | Consider | → | Buy | → | Use | → | Engage |

Aligned to customer journey...
Internal view of people, processes, information and technology

| **People** | **Process** | **Information** | **Technology** |

How customer centric is your organization?

Are your processes simple & easy to navigate?

How much do you know about your customers?

Do you have and support the right technologies?

In Closing...

1. Don't get caught up in the Knowing-Doing Gap – Act on Customer Insights

2. Be sure to take a research-driven approach to Customer Journey Mapping; it will help in prioritizing which sub-journeys our most important

3. Utilize Experience Blueprinting to help you envision experiences operationally whether you are designing for incremental CX improvement or disruptive, game changing innovation

4. Position yourself for implementation success by aligning around People, Process, Information, and Technology

5. Prototype, Test, and Iterate to deliver experiences that meet customer expectations

Any questions? Let's talk...

Thank you!

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