

'A great read.  
Packed full of practical  
and insightful ways  
to transform your  
customer's experience.'  
MIKE WESTCOTT,  
GROUP HR DIRECTOR,  
NATIONAL GRID

# THE CUSTOMER EXPERIENCE BOOK

THE SWEET SPOT

How to **design,**  
**measure** and **improve**  
**CUSTOMER EXPERIENCE**  
in **your business**

ALAN PENNINGTON

## **Praise for *The Customer Experience book***

*'A terrific book that brings to all organisations which care about customer experience pragmatic and valuable solutions to become customer intelligent.'*

**Eric Chang, President,  
ICBC-AXA Life Assurance, China**

*'An excellent guide to the why, what and how of implementing great customer experience. It approaches the subject from both the organisation's and the channel's perspective, providing plenty of useful examples of what to do and what to avoid. A must read for anyone in business looking to improve their situation.'*

**Jerry Smith, President and  
CEO, OgilvyOne Worldwide,  
Asia Pacific**

*'Intelligent, practical and entertaining - The Customer Experience Book should be required reading for every pensions professional concerned about member experience and communications.'*

**Jane Newell DBE, Chair,  
John Lewis Partnership  
Pensions Trust**

*'Pennington has accomplished something important and noteworthy – making "customer experience" something companies can methodically do, manage and improve. This is an insightful and practical book by a leading authority on the subject.'*

**Martha Rogers, Ph.D., Trustability Metrix and  
Peppers & Rogers Group, co-author of  
*Extreme Trust and Managing  
Customer Experience and Relationships***

*'A great read. Packed full of practical and insightful ways to transform your customer's experience.'*

**Mike Westcott, Group HR Director, National Grid**

*'A comprehensive and modern approach to tackling customer experience - the best guide I have read.'*

**Diana Cawley, CEO, Asia Pacific, Geometry Global**

Over the years I have seen various combinations of questions and language to overcome this very real barrier to getting meaningful feedback. My suggestions based on that are as follows:

1. The company clearly explains to all staff the importance of the customer experience that it wants to deliver.
2. The company sets clear expectations about the experience its customers should expect.
3. The company understands the touch-points that are the most important for customers.
4. The company gives enough emphasis to the injection of the desired customer experience into the key business processes.
5. The company uses enough customer data to guide the design of the most important touch-points.
6. The company makes customer information available through a single view.
7. The company has clear links between customer measures and customer outcomes.
8. The company uses customer feedback to identify and deliver experience improvements.
9. The company has behaviours, competencies and training identified to enable staff to deliver the desired customer experience.
10. The company spends enough time communicating direction and taking a visible lead from senior executives in terms of customer experience.

We are asking the respondents to describe the extent to which they agree or disagree with each of the 10 statements.

Offer a scale of 1–5:

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree.

In each case, the questions should be followed by an optional free text box using the statement and a catch-all free text at the end for other comments:

Optional: Please describe why you chose this answer.

The free text is helpful in giving context to the scores and to see if consistent themes emerge that are impacting on the scores either positively or negatively.

A simple way to gather this information is to use an online survey tool – there are plenty to choose from and you only need basic functionality:

- ability to load questions and set a scale for the responder to use;
- ability to load basic information about the responder, e.g. gender, age, length of service, department, job grade, etc.;
- ability to have qualitative free text box responses;
- ability to perform simple segmentation of the data within the tool and output simple reports.

You could consider tools such as SurveyMonkey, KeySurvey, SurveyGizmo and others, all of which are easy to use and low cost.

When conducting these surveys it is key to be able to preserve anonymity to give you the best chance of getting honest answers. While you may not use all of the individual data, it is worth collecting at this stage in order to cover the future eventuality of someone senior asking a question that you need to be able to respond to! For example, is there a difference in view between those who are new to the company and those who have longer service?

One really great way to engage your wider internal team and condition them to receiving regular surveys on the customer experience is to ask people, as part of the first survey, to volunteer to be on a staff panel. You set the expectations at the outset: why join, what will it mean and what will I get out of it?

Remember if you set up an internal research panel this is a commitment and you need to use it regularly and feed back to the team

This an example of a draft email that you could use:

*Dear Colleague,*

*I am really excited to announce the launch of the Company X Peoples Panel. We really value your knowledge and expertise and need your help to shape future decisions on behalf of our customers. It is really easy: all you need to do is click the link below and join our Company X Panel – we will be issuing short questionnaires once a month for you to complete. This will take no more than 10 minutes of your time each month and will be invaluable in shaping our future customer experiences. We will provide regular feedback on the findings and how they are contributing to our customer experience improvements.*

This has the potential to begin to create an internal community and unleash some of that pent up capability – colleagues will self-identify an interest and you can, over time, add in other forums for them to discuss the customer experience on a more regular basis. You will get feedback in real time from a cross section of departments that will help to raise the profile of the customer experience across the company.

Next, select your audience: this could be an all person company survey or you may want to select individuals. If you choose the latter option you need to ensure that you include all senior managers (to avoid upsetting people!) plus a representative sample covering all departments and levels relative to their size. One way to do this is to determine that you want a survey of 30 per cent of the company and ask personnel to identify 30 per cent of the people from each department and across grades. As you can see, the better option is to make this an all company experience!

Having issued the survey, the next step is to collate the data from the responses and feed that back to both the senior team and respondents initially and then the wider company.

Remember the aim of the survey is to understand the current perceived state maturity and to use it to move towards a common view of both the

## current and the required future levels of maturity/competence

### Evaluating the scores

At a simple level take the scores from across the question set and at a question level grade the answers. Where the average score is 1 or 2 you can place the company in the 'starting' stage; where it is 3 'evolving'; 4 is 'maturing'; and 5 is 'maintaining'. Then take the scores for all of the questions and create an overall score for the company.

The best way to feed the information back to the senior team is through a 2–3-hour workshop session – this can be the board or the board and direct reports. You present the information in two parts.

1. First take the senior team view showing the average score across each of the 10 questions. Provide a short digest of the qualitative comments to give context for the scoring.
  - Take each question in turn and ask the team to review that score and agree if it is right or wrong in terms of the current position. Discuss until they reach consensus – you will have different views in the room.
2. Then ask the question 'what would it take for us to achieve our two-year business goals?' Revisit each question and discuss where on the scale the results would need to be.
  - Review the answers and decide as a team where on the scale the company is today: is it starting, evolving, maturing or maintaining in terms of the overall company customer journey maturity.

Having agreed this then it is both revealing and fun to look at what the rest of the company said so create a side by side set of scores for each of the 10 questions showing the wider business scores. Highlight some of the qualitative feedback to give context around why the staff disagrees with the senior leadership view! You will find some, often significant, differences in views from the top to those across the company. Be prepared to break down

the results into different groups or segments to illustrate where the key variances are.

Discuss the reasons why these variances might have occurred. If they are based on the wider company view ask the team whether they want to amend their final scoring – experience tells me that they rarely do!

In my experience most companies will find themselves in the ‘starting’ and at best ‘evolving’ stage. If not, then I suggest you look hard and challenge the evidence for a more advanced level of maturity. This is where the wider company input can be used to offset the usually ambitious and exaggerated view of the senior team.

The purpose of this discussion is to raise awareness that communication on customer experience may be an issue in the company.

Remember it is often the case that activity is in place or happening, but there is no visibility beyond the immediate delivery team

Now you have a leadership consensus on the current and future state at this high level. This provides a platform to begin to dig into the detail of the current customer experience.

You need to communicate the results of the discussions back to those who gave up their time to take part in the original survey and outline what the next steps will be.

This is all part of raising the profile of the customer inside the business. Get the CEO or a senior executive to sign off on the communication to connect the leadership to the customer messages

Remember communicate, communicate, communicate and use the word customer as much as possible

The next piece of the ‘where are we today?’ puzzle is to understand what activity is currently under way that is either badged or designed to directly impact on the customer experience. You need to know what the activity is called, what its objectives are, how and which customer it is designed to impact, when it is due to deliver and if possible the budget.

Create a simple spreadsheet to capture this information. This will be invaluable as we progress and identify opportunities to improve – as a simple step, check are they already in scope of an initiative, will it deliver in time, is there already budget available and other useful insights.

If you have a programme support office, this is often a good starting point to gather the information. If not, monthly reporting packs can be a source, or you need to talk to teams across the business to determine what is under way or in the planning phase.

## **Are we clear on what customer experience we want to deliver?**

Most companies will have a mission statement, a vision and values along with statements about the brand and what it stands for. Very few of my clients over the years have been able to answer the following question: ‘Could you please describe the key characteristics of the customer experience that you want your teams to deliver?’

Ask yourself the question, write down the answer and see how that compares if you ask colleagues within your business. If the leaders cannot answer the question consistently what hope is there for the rest of the company?

As an example, what does this often-used answer actually mean: ‘We want our people to be passionate about the customer’? How does it translate into something relevant and meaningful within finance or customer service or the boardroom? How can anyone in the company be held to account if there is no clear customer experience delivery framework or touchstones that they can use to test their actions?