

# Enhance your customer experiences

By: Kristen Gyorgak



**\*Note:** We'll use the term customer but you can insert: employee, stakeholder, internal peer, etc. Any person.

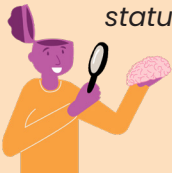
## TL;DR | Summary of these notes

You'll deliver better products if you put the experience and viewpoints of your customers first.

How? Try these 3 things.

### 1. Build for humans.

We're: *flawed, lazy, entitled, biased, attention-craving, status-seekers.*



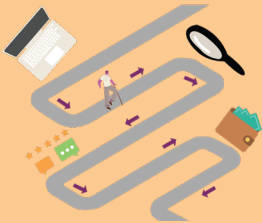
#### So we'll:

- take a reality-based approach > a **should -do** approach
- make doing the right thing, the easiest thing
- look for ways to show care and connection
- understand and reinforce expectations along the way

### 2. Know your customer & understand their experience.

Focus on their needs, POV & experience working with you.

*We already know our own.*



#### So we'll:

- know who our customers are
- decide how we'd customers to *feel* when they work with us
- map out their current experience with us (*and whether that impacts above*)
- highlight where things are working and where improvement can be made
- identify: *pain points, opportunities, moments of truth, touchpoints, etc.*

### 3. Develop your workflows.

Your workflows and internal processes underpin the customer's experience.



#### So we'll:

- map out our current workflows
- identify what needs - should - can't change to meet the desired experience
- what systems, processes and steps do we need to finesse?
- identify actions, prioritise, iterate, deliver and repeat

# 1. Build for people (read: flawed humans)

It might be a paying customer, a local resident or an internal team: we're thinking about the **people** we work with. How can we do this? Apply human-centred principles based in neuroscience and evidence.

Here's what that looks like in action:

## Apply some neuroscience

You can find more details & actions in these notes: [Our Brains at Work](#) and [Our Brains and Bias](#).



<p><b>People are lazy.</b></p> <p>Our brains are built to conserve energy. If something feels hard, people will delay it, abandon it or complain.</p>	<p><b>People have high expectations (and feel entitled that you meet them)</b></p> <p>New innovations quickly become an expectation. Making something <i>better</i> is the baseline.</p>
<p><i>How can we make things easy, seamless and intuitive?</i></p>	<p><i>What can people expect of us? What's unrealistic? How do we make this clear?</i></p>
<p><b>Humans want to feel seen, heard and valued.</b></p> <p>Recognition activates our reward circuits.</p>	<p><b>People remember emotions and endings.</b></p> <p>We feel things first, then we think. And we remember our feelings, peaks and last impressions stronger than the rest of the memory.</p>
<p><i>What personal touches, preferences, thanks can we provide throughout the process?</i></p>	<p><i>How do people feel when they're working with us? How do they feel when they <b>start</b> and <b>stop</b> working with us?</i></p>

## Design for the reality not wishful *should-dos*

Build for how people *actually* behave. Not how they *should* behave or we *wish they would* behave.

Customers *should know* they need to have this information. People *should read* the Terms & Conditions. That team *should follow* the official process. OK. Great. But they don't. So we need to start with what they actually are doing.

Designing for the **SHOULD-DOS** is especially problematic when:

- We're designing systems that we don't use for people we have minimal lived experience with.
- They have to interact with us (government or private monopoly).
- There's a consequence for them not following our system.



## Understand what people care about and notice

Here's a framework (RATER) to highlight what shapes people's impression of their experience and your service.

### RATER Aspects + Team thinking prompts

<b>Reliability</b> you deliver and do what you say you will	<b>Do we do what we say we'll do, every time?</b> <ul style="list-style-type: none"><li>• What promises (<i>implicit or explicit</i>) do we make and do we consistently meet them?</li><li>• Would customers describe us as predictable? Why or why not?</li><li>• When do we drop the ball most often? What does that tell customers?</li></ul>
<b>Assurance</b> People feel confident in you and your ability to help them	<b>Do customers feel safe, confident and looked after?</b> <ul style="list-style-type: none"><li>• How quickly do we signal to customers that they're in capable hands?</li><li>• What behaviours do and don't built confidence in our skills, knowledge, abilities?</li></ul>
<b>Tangible</b> what people can see, feel, hear and smell	<b>What does the <i>stuff</i> around the service say about our service?</b> <ul style="list-style-type: none"><li>• What can customers see, touch, smell or sense?</li><li>• What physical or digital touchpoints do we have?</li><li>• Are our digital tools genuinely intuitive, or do they rely on insider knowledge?</li><li>• What impression do these things make on our customers?</li></ul>
<b>Empathy</b> how much care and support you show	<b>Do we understand and care about the people we're working with?</b> <ul style="list-style-type: none"><li>• What shared and different experiences do we have about them?</li><li>• How often do we proactively make someone's day easier?</li><li>• Do we adapt our tone, timings and communications to the individual?</li></ul>
<b>Responsiveness</b> you quickly and urgently want to help me	<b>Do we act quickly, clearly and helpfully?</b> <ul style="list-style-type: none"><li>• Do we acknowledge requests early, even before we solve them?</li><li>• Do customers know where we're at with our work?</li><li>• What slows us down?</li><li>• What patterns are we seeing in issues we're reacting to?</li></ul>

## 2. Know your customers

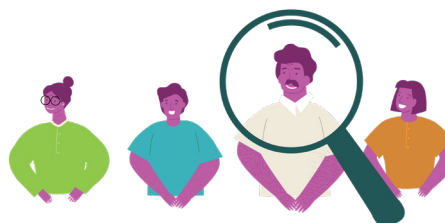
We've used the term customer, but this can be any *person* that you work with or for. Externally, in your organisations it's the *customer, partner, stakeholder experience*. Internally it's your *Employee, Leader, stakeholder project experience, etc.*

### Apply customer-centric lens to your work

In short: In good design, you **first** consider who you're building for.

#### This means understanding:

1. what's important to them
2. your current/desired impact on them
3. your current/desired relationship with them
4. how you can build / improve / add to this.



#### Why this matters:

**Better impact.** You design solutions that actually solve the right problem.

**Better services.** When you know who uses – needs – wants your services, and how they're likely to use it, your delivery methods are more effective.

**Better team engagement.** Team engagement raises when people can connect what they do with who it helps – supports – assists.

### How? Develop personas

This all requires empathy. And to empathise with someone you need to understand who they are, what they need and how they would interact with your product or service. You'll also need empathy to hold a worldview, beliefs, needs or expectations that might be wildly different than your own.

### What if you don't know them?

<b>Data and research</b> What information, data, analytics already exists about the people you're working with? <i>Who would have this?</i> <i>Where can you find it?</i> <i>If it doesn't exist, how can you collect it?</i>	<b>Interviews</b> Sit down individually or in small groups with your customers – stakeholders. Don't make assumptions – ask the questions.
<b>Dear Diary</b> Ask your customer segments to record notes directly. <i>This can be on what it's like working with you, their experience with [xyz process], their hopes for future engagement, etc.</i>	<b>DILO (Day in the life of)</b> Either shadow or ask someone to record their experiences throughout the day. This is a great empathy building exercise.

Focus on customers’ needs first and foremost

Always, always ask what value are you adding by doing what you’re doing. The value should first and foremost be from your customers’ lens (not your own/organisation).

What type of customer value does our work add?

An HBR article by Eric Almquist, John Senior, and Nicolas Bloch splits value to customers into these four groups:

<b>FUNCTIONAL</b>  Informs, reduces effort, avoids hassle, saves time, simplifies, quality, makes money, reduces risk, organises, connects, sensory appeal, reduces cost, variety	
<b>EMOTIONAL</b>  reduces anxiety, rewards, design/aesthetics, badge value, provides access, attractiveness, fun, therapeutic, wellness	
<b>LIFE CHANGING</b>  provides hope, motivation, affiliation/belonging	
<b>SOCIAL IMPACT</b>  contributes to something bigger than an individual - improves community, environment, whānau, workplace, society, etc.	

Be clear about what your success metrics are

This comes back to the tyranny of metrics. How we measure success will dictate what we design. If we have the wrong drivers, we often get the wrong output.

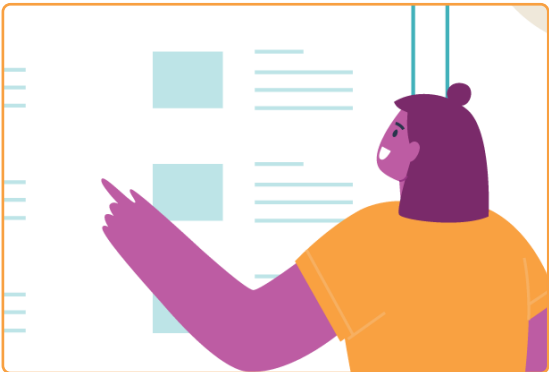
Example: Social media apps. Think about they were designed. Extremely successful for an unhealthy metric (*time spent on app*).

So, what truly defines success and what good looks like **for the customer?** Be clear on this upfront. You’ll have business based metrics but re-prioritise value based on what’s best for the customer.



Example persona overview

This is common practice in customer experience work. You don't have to create one for each person you're working with, just types of people. Here's what you need to know:



Role

Relevant user stories

As a [persona], I want [something] so that [reason].

What do I want / expect from you?

- Is this clear? Is it reasonable?
- Are you meeting my expectations?

What are my pain points?

- The frustrations / challenges I have about working with you
- My likely questions? How do I learn, get educated, understand?
- What are your pain points with me?

Who am I?

- Demographics / age
- my values & motivations
- Skills / knowledge / experience
- Success metrics - what does good look like?
- Relationship with your team

When and how does our journey overlap?

- How do I first find out about your work (entry points)?
- What stage in **my processes - development** does your work feature?
- What do you expect from me at this stage? Is it clear? Is it reasonable?

Knowledge of our offerings & what's needed



Relationship with our team



Time urgency



Chance of repeat interactions



Priority customer groups / segments we need personas for:



Role:

**Relevant user stories**

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**What do I want / expect from you?**

---

**What are my pain points?**

---

**Who am I?**

---

**When and how does our journey overlap?**

---

**Knowledge of my teams processes – offerings**

Low High

**Relationship with our team**

Low High

**Time urgency**

Low High

**Chance of repeat interactions**

Low High

Here are some more customer prompts. Respond from their point of view:  
Repeat for all your customer segments.

**WHO AM I?**  
Why this matters: highlights what’s important to me and what my priorities are

Demographics – Identity:  
*age, gender, location, education, compliance, income, hobbies, organisation, role, experience, current relationship with you, etc.*

Consider what this means in terms of:  
*priorities, values, beliefs, traditions/habits, restrictions, preferences (loves/loathes) challenges, deterrents, etc.*

**WHAT DO I WANT / NEED?**  
Why this matters: reinforces why we’re crossing paths and how I feel about it

Am I a willing customer or do I have to work with you? How can you help me solve my problems not be one of my problems?

**HOW WILL YOU REACH ME?**  
Why this matters: highlights the touchpoints between me and your team

How do I hear about your services – work – requirements?  
*Do I go to you, or do you come to me?*

Communication channel:  
*meetings, email, phone, Teams, social media, newspapers, conferences, visual advertisement, legislation, reporting*

**WHAT’S THE PROCESS?**  
Why this matters: gives me clarity. what happens, by whom, when & what’s expected

Map the journey (or workflow) which highlights what the persona segment goes through in order to accomplish their goals.

Where are expectations not met? Pain points? Moments of truth? Channels used? Time spent?





# Your customer experience journey

Think about all the steps and stages a person has to go through in order to achieve what they are trying to do.

Whether you're designing tangible or intangible things, you should be considering the full journey people go on to successfully work with you.

Note: **Each customer journey is underpinned by INTERNAL PROCESSES & WORKFLOWS.**



## Best Practice Team Operations:

1. **Identify the people you work with.** Externally and internally.
2. **Develop personas.** An overview of who they are, what's important and how you work with them (current and desired future state)
3. **Map out your current customer journey, first.** From the customer's POV what happens and how. From first awareness through the whole cycle of working with you.
4. **Map out your current internal workflows** that bring the customer's experience to life.
5. **Highlight, reflect, address** the reflection points through

*Note: You may need to repeat this process multiple times for each persona.*

*Which aspects do you do well? What could you do more of?*

<b>PURPOSE</b>	<ul style="list-style-type: none"> <li>Why is this person/group engaging with us in the first place?</li> </ul>
<b>STEPS</b>	<ul style="list-style-type: none"> <li>What are they doing, when? <i>Might be heaps of steps!</i></li> <li>What currently happens? What would be the desired states?</li> </ul>
<b>ENTRY POINTS</b>	<ul style="list-style-type: none"> <li>Do they come to you or do you go to them?</li> <li>Where and how does the relationship and connection to what you're designing begin?</li> </ul>
<b>CHANNELS</b>	<ul style="list-style-type: none"> <li>What are the main channels - ways you communicate with these groups?</li> <li>What channels do they need to have to complete this?</li> <li>Are you proactively pushing information? <i>If so, through what channels and do these customers use those channels?</i></li> </ul>
<b>INFORMATION</b>	<ul style="list-style-type: none"> <li>What information do you need them to know when engaging with you?</li> <li>What information are they trying to find out from you?</li> <li>What information are you trying to find out from them?</li> </ul>
<b>TIMEFRAMES</b>	<ul style="list-style-type: none"> <li>What are the expected / regulatory timeframes for each stage of the process?</li> <li>How long does it take for people to get a response and a resolution?</li> <li>Are these times appropriate?</li> </ul>
<b>PAIN POINTS</b>	<ul style="list-style-type: none"> <li>What's frustrating the customers at the moment?</li> <li>How will your product/service solve this?</li> <li>What frustrations exist within your processes? How can you address these?</li> </ul>
<b>UNNECESSARY TOUCH POINTS</b>	<ul style="list-style-type: none"> <li>Are there any opportunities to reduce double handling or streamline processes?</li> </ul>
<b>EXPECTATIONS</b>	<ul style="list-style-type: none"> <li>Where are the points in the journey where the person's expectations are not being met? Is this an opportunity for you?</li> </ul>
<b>MOMENTS OF TRUTH</b>	<ul style="list-style-type: none"> <li>How are you showing customers you care about their experience?</li> <li>Are there make-or-break moments in your customers' journeys?</li> </ul>

<b>PURPOSE</b>	
<b>STEPS</b>	
<b>ENTRY POINTS</b>	
<b>CHANNELS</b>	
<b>INFORMATION</b>	
<b>TIMEFRAMES</b>	
<b>PAIN POINTS</b>	
<b>UNNECESSARY TOUCH POINTS</b>	
<b>EXPECTATIONS</b>	
<b>MOMENTS OF TRUTH</b>	

# Add new ideas to your backlog

Your backlog is like your work-wishlist. Things get added to the backlog because they are necessary components, expectations of customers-stakeholders, ideas – needs – pain points raised in feedback.

But it shouldn't just be a big brain-dump. Your backlog needs to be **DEEP: Detailed appropriately, Estimated, Emergent, Prioritised**. Here are some tools to help with this:

## MoSCoW

Must have	
Should have	
Could have	
Won't have (for now)	

## Sizing

For each task identify the effort required for delivery + who's time is needed. Get the person delivering the work involved (or someone who can represent that function).

To accurately size, the work needs to be well-defined.

- **Estimate time buckets not hours** (half-day, day, 2-3 days, longer?)
- **You can represent these using t-shirt sizes:** XS, S, M, L, XL

## Impact vs Effort

Impact is from the customer lens. Effort is from your lens.

IMPACT	HIGH IMPACT, LOW EFFORT Do first.	HIGH IMPACT, HIGH EFFORT Consider.
	LOW IMPACT, LOW EFFORT Maybe.	LOW IMPACT, HIGH EFFORT Drop.
EFFORT		

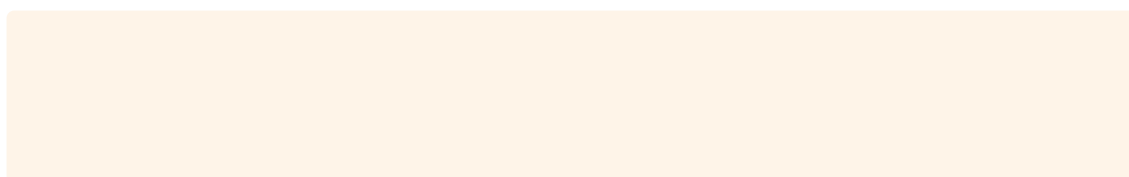
## Solve problems through creative Thinking

### How might we...

Shift mindsets from stuck towards solutions.

### How might we [action] for [user] in order to [achieve outcome]?

Example: *How might we reduce the cost of entry?*

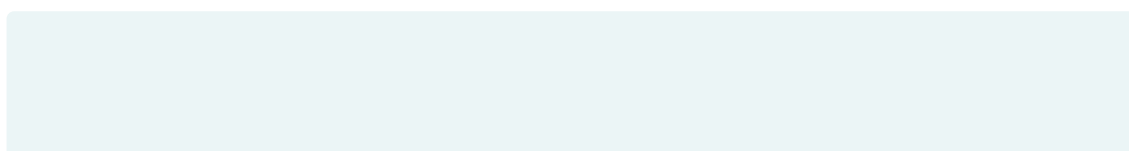


### Jobs to be done

Describe what you're trying to *accomplish* not just tasks and actions.

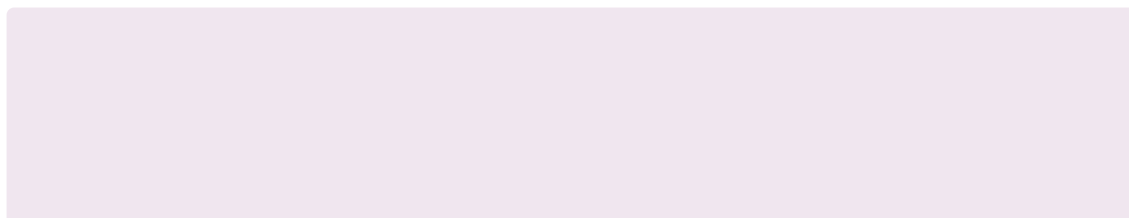
### When I [situation], I want [motivation], so I can [outcome].

*When I come to governance training programmes, I want to record that I've completed this, so I can add this to my CV.*



## SCAMPER Prompts

- **Substitute:** What can be replaced?
- **Combine:** What can be merged?
- **Adapt:** What else is like this?
- **Modify:** What can be exaggerated or minimised?
- **Put to other use:** Can it be repurposed?
- **Eliminate:** What can be removed?
- **Rearrange/Reverse:** Can the order change?



## Wild 8's Sketching

Fold sheet into 8 boxes and rapidly sketch 8 different ideas in 8 minutes. These can be directed or completely open.

## 5 Whys

Root-cause questioning.

Ask: *Why is this happening?* Repeat x5.

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## Thanks for coming!

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Get in touch: 027 222 1498 | [office@trainingpractice.co.nz](mailto:office@trainingpractice.co.nz)

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