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EXPERIENCE

Holistic Approach to CX Design

Service Blueprints Over Journey Mapping

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The universal objective of Customer Experience (CX) design is to deliver exceptional interactions that quickly transition prospects to customers; drive loyalty and customer penetration; and ideally, reduce or optimize internal costs when delivering those experiences. The means to those ends are much more complex, and identifying where to prioritize limited resources to pursue those ends is even more challenging.

There is no one right answer to how organizations should address enterprise CX design. Approaches differ based on investment capabilities, CX maturity levels, customer journey complexity, persona diversity and many other variables. Every company is unique, and different approaches are appropriate for companies with differing levels of strategies, objectives, and situations.

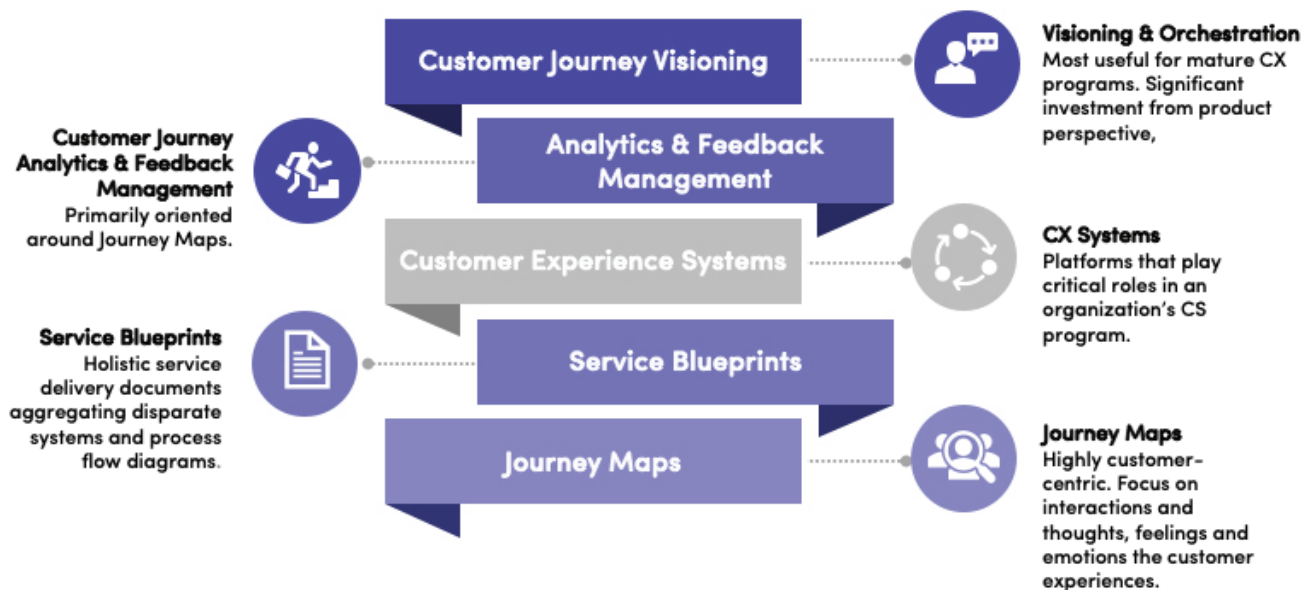
But all organizations should ensure that their technology design approaches are not myopic and are not influenced by product capabilities of the systems that they have purchased. It is easy to get caught up in technology features and vendor roadmaps and lose touch with customers' actual experiences. There are two approaches that help reinforce a customer centric perspective that should be considered: Journey Mapping and Service Blueprints.

Management teams should foster spirited dialog to evaluate strategies, approaches, and options prior to devoting significant time and resources to these efforts. We typically frame this conversation with company executives around the image below.

Virtually all companies are well versed in many of the technologies represented in the grey CX systems box and can provide insight into roadmaps and initiatives underway in many of these areas. Examples of these technologies include:

- Marketing Automation
- Digital Experience
- Omni-Channel
- Workforce Engagement and Optimization
- Customer Relationship Management
- Communication Preference Management and Compliance

While many executives indicate that their organization has done some level of journey mapping, in our experience, fewer have done extensive service blueprinting. And only the most mature companies talk about how these CX systems work in conjunction with sophisticated customer journey orchestration, feedback, and analytics solutions.



Journey Mapping

Journey maps ensure organizations take a customer-centric point of view when evaluating customer experiences. These maps typically focus on customer sentiment by dissecting their actions, thoughts, feelings, and emotions in the context of a specific interaction that may span multiple touchpoints. For instance:

- What are the most common events resulting in customers contacting a company's Support department?
- What channels are available to customers?
- What steps are involved in an inquiry from a customer's perspective?
- What is the desired outcome for the customer and what feelings do we want the customer to experience?

Companies use an array of tools to build these maps, from basic solutions such as Microsoft Whiteboard to advanced technologies such as Touchpoint Dashboard.

Journey maps can be aesthetically pleasing and easy to understand; they enable visualization of how customers engage with your company and how those experiences are intended to make the customer feel. But journey maps only lightly touch on the underlying processes and technologies that facilitate those customer experiences, and they do not effectively expose how processes and technologies can be improved.

As an example, a journey map illustrates a customer's experience as they enter a restaurant or make a reservation or a payment online. It shows the steps they take and describes the feelings and emotions the restaurant wants to elicit from their customer. But journey maps do not generally depict how a Point-of-Sale (POS) system influences this process at a detailed level (data flows, integrations, infrastructure, etc.).

Service Blueprints

While design approaches using both service blueprints and journey maps are valuable, there are clear benefits when design efforts prioritize service blueprints over investments in journey mapping. Service blueprints can improve CX and provide visibility to broader enterprise solution designs.

They can more quickly identify low-hanging fruit and serve as a foundation for more effective journey mapping and more advanced solutions such as customer feedback management, journey analytics and orchestration.

Journey maps document what you want the CX to look like, but service blueprints illustrate how those experiences are built and delivered. Imagine that you are an investor and one of your investments is a restaurant. You could use journey maps to describe the experiences you want your diners to have, and voice of the customer (VOC) metrics to understand their actual perceptions. Journey maps describe the thoughts you want your customers to have as they enter your restaurant, how they are greeted and seated, how they feel about the service and food that they are enjoying, and the emotions they have when they reflect on the dining experience as a whole.

If you truly want to improve CX, you must examine the underlying systems and processes used to deliver those experiences. In the restaurant industry, examples include:

- Website and advertising tools
- Reservation systems
- Hiring and recruiting programs
- Training procedures
- Workforce scheduling
- Order management
- Point of Sale systems
- Inventory management
- Customer feedback
- Loyalty programs

Service blueprints cover these critical systems and processes, and provide you with a foundational understanding to identify and prioritize areas of opportunity. They illustrate how an organization applies its raw materials and resources with its internal processes to deliver goods and services. We typically organize service blueprints around horizontal swim lanes bisected by vertical stages representing specific interaction events spanning the broader journey stages (e.g., brand awareness, product evaluation, purchase and provision, use, advocacy, and penetration).

Service Blueprint Template

Brand Awareness → Product Evaluation → Purchase & Provisioning → Use → Advocacy & Penetration

Catalog the primary reasons that prospects and customers interact and engage with your company. Early in the customer lifecycle they are oriented around marketing and sales activities such as advertising campaigns and lead generation, then transition into purchasing and set up events, then evolve into ongoing support and ideally, evolve to renewal and expanded product purchases.

Each of these events is an opportunity for companies to design, analyze and optimize these engagements to elicit the preferred outcome.



This section should illustrate the effort and specific actions that customers take to complete interactions, both with your automated systems and with your associates.

This step should drill down vertically within each Interaction Reason.

This swim lane should illustrate both the automated systems and specific steps taken. For instance, for an Interaction Reason during the Product Evaluation stage, this blueprint will document each automated system that is available (e.g., website, mobile app, chatbot, IVR, etc.) and indicate how that interaction specifically occurs.

Similar to Automation, this section should document interactions that occur with live associates. For example, if a customer wants to purchase a product, this swim lane should include all channels through which a customer can perform this transaction through a live associate (e.g., chat, email, cobrowse, phone, etc.).

This section continues to illustrate effort from a customer's perspective, but also begins to document the steps an associate has to perform to complete each type of transaction. Companies should have a solid understanding of both the customer and employee experiences.

Going hand in hand with the CX Systems listed in the middle of the CX Design image, document the key enabling technologies that support the Interaction Reasons listed above. This section should show how these technologies support the business processes in the preceding swim lanes. Additional value can be achieved by illustrating the interdependencies and integrations between these systems.

It is essential to include key measurement metrics for these Interactions. The ability to understand these metrics provides tremendous insight evaluating the efficiency and value of these interactions. It is sometimes worthwhile to create sub-swim lanes within this section measuring: VCVE (Volume, Conversion, Velocity and Effort), Revenue, Operational Efficiency and Voice of the Customer metrics.

Lastly, as details are added in the swim lanes above, especially as measurements are added, it becomes apparent where opportunities for improvement exist. Beginning a catalog of these opportunities will provide a solid foundation to move into Value Mapping activities that prioritize CX design improvement initiatives.

Completing this exercise entails tracking down a multitude of micro-level, specific service delivery flow documents typically spread out across functional owners. In a customer service context, there might be documents focused on:

- Cataloging all 800 numbers that route into a contact center,
- Others that diagram IVR treatments (flows and prompts),
- Still others that illustrate staffing/skill models, and
- Even more that break down how a customer service associate navigates various applications to process transactions.

These are just a few examples of design documents; dozens more exist in the customer service arena alone. Some of these documents are owned by IT, others by Operations, or by Marketing.

Often, the areas that are most difficult to document are the areas least understood...and frequently, where significant opportunity lies.

Service Blueprints do not have to be “boil the ocean” types of efforts. Focus first on known service delivery problem areas that are not well understood.

Service blueprints bring these disparate pieces together and to create a more holistic picture. They inject necessary customer centricity into the service delivery flows and illustrate how employee and automated processes are designed with the underlying technologies. As highlighted above, it is important to insert measurements throughout these blueprints. A few examples of measurements include:

- Volumes of interactions/transactions being handled
- Wait times when customers reach out across various channels

- Handle times to complete interactions
- Outcomes based on reasons for engagements
- Revenue and costs per interaction
- Customer satisfaction scores

With this foundation in place, organizations will have a clear depiction of the efforts customers and employees must make to process various transactions.

Blueprints become a rallying point for internal stakeholders ranging from Operations to Product Development to Marketing to IT. As these groups collaborate to flesh out service blueprints, they begin to align around common and shared understandings, challenges, and opportunities, and then begin to solve problems from an enterprise point of view. For instance, organizations may find different business units or departments are addressing shared challenges in different ways through multiple technologies. One business unit may be managing customer interaction preferences and compliance with one technology vendor and another might be solving preferences and compliance with a completely different vendor. Identifying these opportunities and standardizing on common solutions reduces costs and simplifies internal processes.

Impact on Customer Experience (CX)

As with all investments, CX systems and journey maps must tie back to initiatives that drive actual impact. If these activities do not identify root causes of opportunities or quantifiably illustrate where limited resources should be prioritized, they will not have the impact executives expect. During strategic CX design conversations with executives, we are frequently surprised how few bring up service blueprints when describing how they are prioritizing investment to improve customer experiences and internal operating procedures.

We believe in the adage you cannot solve a problem unless you understand it. If you want to improve the experiences you are providing your customers (and what you are expecting your employees to manage), you must understand

the details behind how those experiences are designed and delivered. By focusing on documenting the details around how your systems, processes, and employees engage with customers, you can identify areas for immediate improvements and build a strategic CX roadmap.

While journey maps deliver valuable insight, service blueprints:

- Organize and standardize disparate and disjointed internal process documentation.
- Combine these documents into a higher-level system flow.
- Illustrate both customer and employee experiences.
- Drive enterprise architecture designs.
- Serve as a rallying point bringing previously isolated resources into collaborative working sessions all likely at a far lower investment.

Both journey maps and service blueprints begin to organize disparate, myopic process documents into holistic flows that keep the customer experience paramount, but service blueprints provide a better foundation and are likely to deliver a better return on investment. Armed with service blueprints, organizations can overlay journey maps to analyze and more deeply understand customer sentiment.

If you or your organization needs help aligning the myriad technology solutions, business processes and CX design approaches available, or if you need assistance building or improving service blueprints, we would be happy to help. Contact us today for more information and take the next steps toward improved customer experiences and internal profitability.

For more information about developing your customer experience, consider reading our white paper series, including:

- 5 Key Steps to Align Customer Experience with Evolving Customer Expectations
- Next Generation Customer Experience
- The Four Dimensions of the Customer Experience
- Customer-centric Business Transformation is the Key to Market Leadership

- Modern Identity Management Promises to Improve BOTH Security and Customer Experiences

Find them at Cimphoni.com/white-papers.

ABOUT THE AUTHOR

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Ruben is managing partner and leads Cimphoni's customer experience practice, combining extensive technology, operational and business expertise to help clients maximize and align technology with their strategic objectives. He has more than 20 years of experience in technology, product development, service delivery and operations functions in the business process outsourcing (BPO) industry. Ruben's specialties include customer experience, workforce optimization, business intelligence, software development, infrastructure, cloud solutions and professional and technical services management. He serves as an advisory board member for the University of Wisconsin – Parkside Customer Experience (CX) Executive Certification Program.

Some of Ruben's recent projects include leadership of Customer Experience Strategy and Transformation and Post-Merger Integrations in the Road Service, Insurance & Travel industries, Operational Process Optimization in the Financial Services industry, as well as an Interim CEO assignment for a technology provider in the rapidly growing Identity and Access Management market. Prior to joining Cimphoni, Ruben was COO of TantaComm, a leading workforce optimization solutions provider. He has a Bachelor's degree in history and sociology, and an MBA from the University of Iowa. Ruben spends his free time playing hockey and attending his children's soccer games, cross country and track meets and dance competitions.

About Cimphoni

Cimphoni is built on the premise that technology, when properly applied and led, can deliver innovative solutions that transform businesses, enrich the products we use daily and improve the quality of our lives. The Cimphoni team is comprised of highly-experienced technology and business leaders with a thirst for innovation and a passion for solving problems.

Founded in 2012, we serve customers throughout the United States from our offices in suburban Milwaukee.

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If you are ready to take the next step in exploring how our CX Service Blueprints can help your organization, please contact us at (888) 470-0448 or info@cimphoni.com.