Make it Clear

Delivering outstanding customer experiences

Introduction

Written by our research and strategy team, with shared insights and input from across the company and some of our clients, this report covers the fundamentals of delivering an outstanding customer experience (CX).

We have spent many years helping our clients improve how they attract, engage and delight both new and existing customers. During this time we have defined our own approach to CX, including processes, principles and tools.

We hope you find this report, and the supporting resources, helpful in supporting your organisation to deliver outstanding customer experiences.

If you would like any further information on how Make it Clear can support your organisation to deliver a best in class customer experience, get in touch at **hello@makeitclear.com**

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What is customer experience (CX)?

Customer experience covers all of the interactions a customer has with an organisation. This encompasses all stages and touchpoints across a customer's journey – from an early stage prospect to, hopefully, becoming an advocate that champions the company and refers new customers.

Customer experience

is focused on the customer's interactions, but employee and user experience are both likely to impact this experience.

Employee experience

includes company values, culture and training.

User experience

focuses on digital products and services – such as a website or app, where the customer is a 'user' of that tool.

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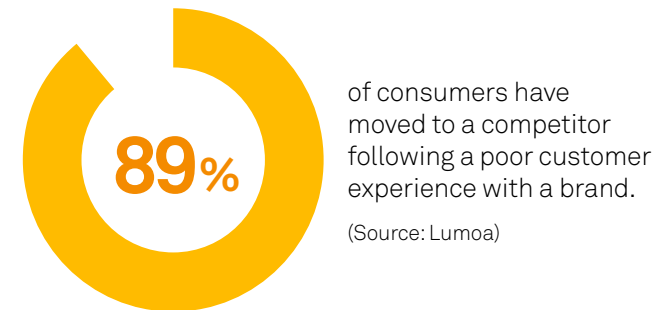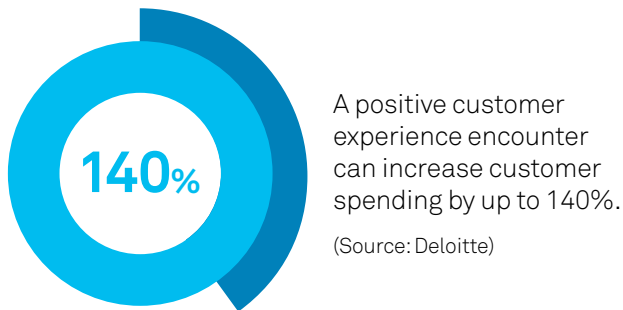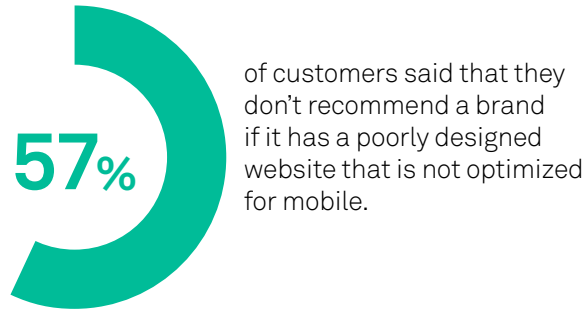
Why is customer experience important?

CX is already a main priority for many organisations. A customer-focused, value driven experience is proven to increase customer loyalty, drive results and offer many benefits for organisations and customers, as shown by these statistics:

1.4x Customer-focused companies increase their revenue 1.4x faster than non-customer-focused companies.

(Source: Forrester)

57% of customers said that they don't recommend a brand if it has a poorly designed website that is not optimized for mobile.

92% of customers would forget about a brand after experiencing two or three negative customer experiences with that same brand.

(Source: Super Office)

140% A positive customer experience encounter can increase customer spending by up to 140%.

(Source: Deloitte)

49% of customers agree that they have made impulse purchases after an excellent customized personal experience with a brand.

(Source: Dot Digital)

89% of consumers have moved to a competitor following a poor customer experience with a brand.

(Source: Lumoa)

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What makes a great customer experience?

Great customer experiences are timely, consistent and engaging.

Regardless of the industry or whether the experience is B2B or B2C, designing great customer experiences is actually quite simple. Organisations that deliver great experiences start with research and insights and focus on establishing positive connections with customers at every touchpoint.

Depending on the organisation, many touch points may involve interactions with employees. Therefore, employee engagement, satisfaction, and happiness – or the 'employee experience' – is crucial to the customer experience. This includes relevant training and the use of technology to empower employees.

When helping our clients to define and improve their customer experiences, we like to assess whether the result of engaging at each touchpoint is likely to create confusion or confidence for the customer. In our experience these two markers are the strongest indicators of whether a negative or positive experience is likely.

As a business changes or grows, delivering great experiences, dealing with issues and sustaining success can be challenging. However, with a strong foundation supported by CX tools such as customer personas and journeys maps, an organisation can focus on customer outcomes.

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CX principles

When writing this report we spent time discussing what it means to deliver an outstanding customer experience. Inspired by sharing insights amongst our team and reflecting on our clients' successes, we developed a set of principles we hope you will find useful when looking to define and implement your own CX approach.

Learn from your customers

Conduct research such as interviews, surveys or user observations - consider what your customers do, rather than what they say they want. Finding relevant participants can be a challenge.
To address this, some organisations have customer research groups or panels. They can then help when you look to trial new ideas or approaches. This process can be further supported by collecting and acting on customer feedback.

Track your progress with measurable results and KPIs

Think first about your goals or vision of customer experience in the future, then work back to define actionable metrics that will help your organisation achieve those goals. Actionable metrics provide insights to inform decisions, for example conversion rate, customer lifetime value, new vs. returning customers, return of investment, etc. Set aside time to regularly review your results, gather feedback from customers and consider options for improvement.

Be proactive

Customer experience is an ongoing challenge that needs a proactive approach to be successful. When looking for new ideas, look at best-in-class examples as well as your competitors. Be on the lookout for potential issues; consider what's working and areas to be improved. Create a dedicated team responsible for customer experience design. This can help the organisation identify challenges, adapt quickly and be responsive to changing customer behaviours or expectations.

Personalise the experience

Tailoring your offer and approach based on what you know about your customers can give your organisation an edge when engaging and converting new and existing customers. Examples include: providing similar product suggestions, 'You may also like…', tailoring email communications based on the products or services purchased or even sending offers on a customer's birthday.

Make use of established tools and frameworks

There are plenty of examples of outstanding customer experiences, many of which are based on freely available tools and frameworks. Learn from the best-in-class and consider how you may be able to benefit from using tools like the Jobs to be Done (JTBD) framework.

Make CX a priority for your organisation

Customer-centricity is key to delivering outstanding experiences. If the customer is not at the forefront of decision making across the organisation then the likelihood of success is reduced. Sharing the principles and success stories of customer experience design can help get other teams onboard with CX. Customer personas are a key tool in ensuring decision making is focused on your customers' needs and motivations.

Use technology to your advantage

From chatbots and CRMs to micro surveys and heat mapping – there are many flavours of customer engagement tools that can help you drive customer loyalty and uncover insights to share across your organisation. Speed, convenience, knowledgeable help and friendly service are the most important elements of a positive customer experience – prioritise technologies that support these areas.

Be careful with automation

You may want to consider automating processes to reduce friction and improve the overall experience. Before automating anything, it is important to recognise the benefits of human interactions with customers. Whether the long term impact of automation is positive or negative for businesses will mostly be guided by the emotional intelligence with which it's applied – something the algorithms can't help with (yet).

Define your onboarding and support processes

Processes are key to delivering consistent experiences. There are many methods and tools available including service blueprints and journey mapping. Onboarding and support are the two key processes to start with. When mapping these processes it's important to gather input from across relevant teams. Consider what training may be needed to empower employees, how you'll monitor feedback and results, and whether a CRM tool, such as Salesforce or HubSpot, might help.

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"Omnichannel strategies are becoming more and more important. Omnichannel customer experiences relate to the various touchpoints a customer may use over different channels that seamlessly connect. Done well, this allows customers to pick up where they left off on one channel and continue the experience on another."

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Customer experience tools

Over the years we have used and experimented with a vast array of new and exciting tools and approaches to help our clients better understand their customers and ultimately improve customer experience.

We believe you can set your organisation up to deliver outstanding customer experiences by creating, and more importantly, using a small set of CX tools to ensure your customers are central to your decision making.

The tools include: customer personas, journey maps, service blueprints and at least one feedback mechanism.

In this section we outline the purpose of each of these tools, why we believe they are important and the processes we use to help our clients define and improve experiences using the toolset.

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Persona

What is a persona?

A customer persona is a representation of a typical buyer, including demographics, goals, challenges and behaviours.
We advise our clients to build 3-4 priority personas. Any more can have a negative impact on decision making.

Why use personas?

Personas help organisations to design experiences with the customer in mind, providing a clear understanding of the customer's needs, wants and motivations to guide decision making.

How are personas used?

Personas should be a key part of all decision making, not only during the design and development phases but also when reviewing or changing customer experience touchpoints.

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Personas creation process

1 | Conduct research

We begin by conducting research on existing users. This can take the form of interviews, surveys, observations, social listening, discussion with key stakeholders or a combination of these methods. In some instances we first conduct interviews with internal teams to establish priority user types to target.

2 | Identify themes and patterns

From this initial research, we can then validate the three to four persona types chosen and analyse the data to identify common themes and patterns across behaviours, motivations, pain points and emotions across each.

3 | Map the data

The next phase is to focus on attributing the information to your set of key personas to ensure they are specific enough to represent a single type of user, but also broad enough that variations within that user type can be accommodated. Typically, personas include: name, age, role, background story and a short quote focused on the persona's key purpose. In addition we include insights on the broad journey stages and touch-points to create a more in-depth understanding of the user.

4 | Visualise the personas

This is where the persona comes to life. All of the information gathered and attributed is then visualised in the form of a poster. These posters contain all the key information about the persona and a relevant image. This can be printed or shared as a PDF for easy reference.
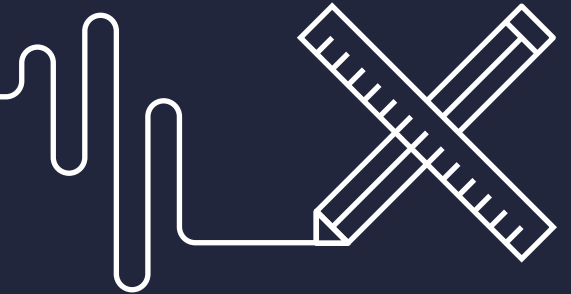
> " A good persona has the ability to be the extra member of a project team. They can answer questions and help direct strategic decisions. "

Persona example template

Persona template (Marketing)

Project weighting [ ] %

Demographics

| Name |
| Age | Technical skill | % |
| Job title |

Quotation

Short bio

Attributes
What qualities does the persona embody

Motivators
What are the motivators

Concerns
What worries the persona

Moments that matter
What are the key moments in the journey
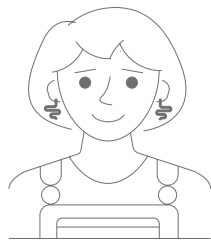
Behaviours
What behaviours does the persona embody

Channels
Channels used, for example social media?

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Persona template (UX)

Project weighting [ ] %

Demographics

| Name |
| Age | Technical skill | % |
| Job title |

Quotation

Attributes
What qualities does the persona embody

Goals
What are they trying to achieve

Needs
What does the persona need?

Motivators
What motivates them

Challenges
What frustrates them

Touchpoints
Interaction points with the product

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Journey maps

What is a journey map?

A journey map is a visualisation of the route users take as they engage with a company, product, service or brand. We advise our clients to create a journey map per persona.

Why use journey maps?

Journey maps provide a clear picture of the end to end experience, identifying the touch-points, channels, activities, emotions, pain points and opportunities along a time-based journey from the user perspective.

How are journey maps used?

When used together with personas, journey maps can help to identify pain points in the current experience, direct ideation on opportunities and support decision making.

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Journey map development process

1 | Define the goals of the exercise

Common goals include: better understanding customer interactions, reducing churn or improving customer experience. Once this has been defined, we then select the audience for the exercise, ideally from a set of existing user personas.

2 | Conduct research

The type of research needed is defined by the project requirements and can either be qualitative or quantitative, including methods such as: user observations, customer interviews, focus groups, website data analysis and social listening. Alternatively, you may be able to use existing data gathered from persona research.

3 | Map the data

We begin with defining the journey stages. The traditional stages include: awareness, consideration, purchase, retention and advocacy. Following this, we analyse the data to find trends and themes across top-level interactions, behaviours and motivations which are mapped out into the different stages of the journey. This basic structure is then used to define the rest of the journey.

4 | Visualise the journey map

More details are then added to bring the journey to life. This typically includes: goals and motivations, activities, pain points and opportunities. The journey map should then be visualised to be engaging and easy to follow, and aligned with the organisation's brand.
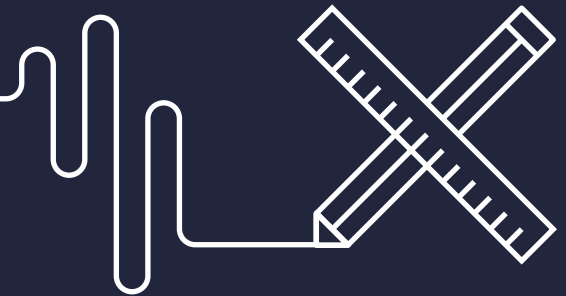
Best practices
Including high level persona information on a journey map not only helps to bring the journey to life but also acts as a helpful reminder of who is completing the journey when reviewing and using the tool.

Journey map example template

Stages	Stage one	Stage two	Stage three	Stage four
Motivation				
Activities				
Touchpoints				
Needs				
Pain points				
Feeling				
Opportunities				

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Service blueprints

What is a service blueprint?

A service blueprint provides a visual overview of customer interactions, processes and teams involved in delivering a service. This includes the people, touch-points, processes and technology both frontstage (what customers see) and backstage (what is involved behind the scenes). The blueprint can represent the current (as-is) service or reflect a future (to-be) state.

How are service blueprints used?

Mapping a service blueprint should be a collaborative effort and can help internal teams understand how their individual areas of responsibility combine to deliver the overall service. Designed with user and employee perspectives in mind, service blueprints are then used to assess, implement and maintain a service process.

Why use service blueprints?

Service blueprints can make it easier for teams to design new processes or assess and improve existing services. They help focus attention on the customer experience and the operational process of delivering that experience.

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Service blueprint creation process

1 | Define the goals of the exercise

Your goal may be to: improve customer or employee experience, understand and further define processes needed for a new service or to improve efficiency and understanding across teams of an existing service. It's important to identify which internal teams are part of the service and include representatives within the research and refinement stages. An initial collaboration workshop with stakeholders should be conducted at this stage.

2 | Conduct research and gather information

Research methods can include: interviews with employees and customers, observations, site visits. In some instances it may be that you can rely on existing research and materials drawing insights from materials such as: personas, journey maps, employee handbooks or stakeholder workshops.

3 | Map the data

We begin by defining the blueprint stages. Following this, we analyse the data. This often includes information such as: user goals and motivations, actions, touch-points, emotions and pain points as well as internal teams' responsibilities, support processes, tools and pain points.

4 | Iterate and refine with stakeholders

Once data gathered has been mapped we invite stakeholders from all relevant teams to review the blueprint, which provides an opportunity to fill any knowledge gaps and ensure all stakeholders are in agreement. It is important that this group is representative of the teams included in the blueprint.
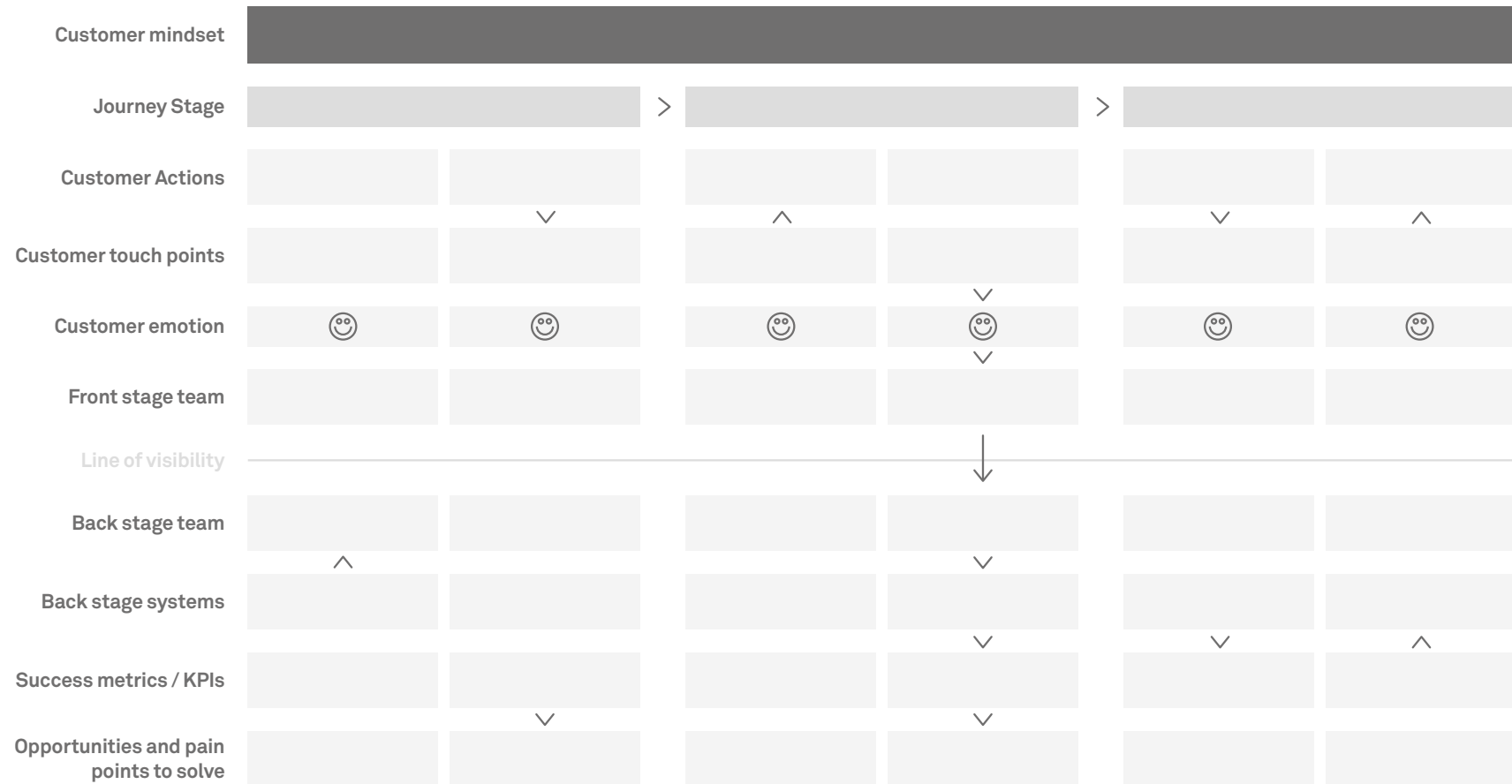
5 | Visualise the service blueprint

Following the workshop any additional information can be added or updated and the blueprint visualised following the organisation's brand guidelines.
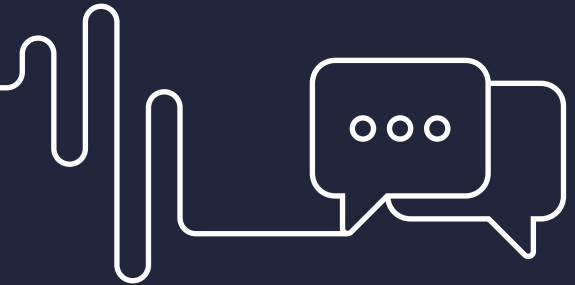
> **Mapping processes is a useful activity. A service blueprint is one example of how to do this, however you may also consider experience flows or incorporating service design as a wider discipline into your ways of working.**

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Service blueprint example template

Customer mindset						
Journey Stage						
Customer Actions						
Customer touch points						
Customer emotion	☺	☺	☺	☺	☺	☺
Front stage team						
Line of visibility						
Back stage team						
Back stage systems						
Success metrics / KPIs						
Opportunities and pain points to solve						

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Feedback mechanisms

What are feedback mechanisms?

Feedback mechanisms are used to capture insights and to track and measure the success of your customer experience. This can include insights such as NPS scores, website analytics or metrics.

Why use feedback mechanisms?

With customer needs and expectations constantly evolving, feedback mechanisms enable your organisation to better understand how well these needs are being met and provide insight to achieve business goals. Building in a feedback loop through gathering, analysing and actioning data collected helps to ensure a consistent and best-in-class customer experience.

How are feedback mechanisms used?

There are a number of tools and methods that can help. This includes dedicated tools such as Usabilla to capture feedback directly from customers on your website or app or tailored enterprise solutions such as Medallia. You may also consider manual or more traditional methods to capture feedback such as through customer service teams, surveys or customer interviews.

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# Feedback mechanisms process

1 | Define the goals

Your goal may be to: improve customer experience. Start by defining the type of information that you would like to capture. This may include gathering insights such as: understanding which areas of your website are most popular or how the customer would rate their experience with your organisation. It is useful to gain input from across internal teams to identify what information may already be being captured and what insights should be prioritised. As you do this consider why these insights are useful and what the outcome of capturing this information could look like.

2 | Identify how you will capture this information

Once you have identified what information would be of most interest to your teams you can then decide on the best way to capture these insights. Examples include using Google Analytics to measure user behaviour and integrating Voice of the Customer tools such as Usabilla to create on-site surveys or feedback opportunities. You could also involve customer-facing teams such as customer service to report on recurring customer issues or themes. For larger organisations, platforms such as Medallia can be more appropriate to capture insights and support and empower teams to improve CX.

3 | Establish a process

Now that the what, why and how have been defined it's critical to ensure a process for capturing, relaying and improving on the feedback gathered has been defined. Establish which role or team is responsible for gathering and measuring feedback, how frequently this will be done and how it will be reported on. Following this, outline the process for making updates or pursuing new opportunities. Building in a feedback loop ensures that your efforts aren't wasted and insights are actioned to continually improve your CX.
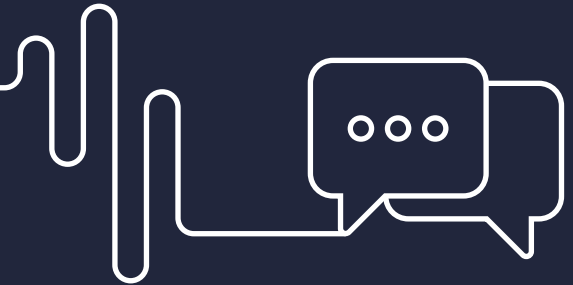
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We are Make it Clear, and that's what we do.

Make it Clear is a London-based design and marketing agency with a proven record of customer experience design for clients such as Virgin Media, Google, Cambridge University Press, Thales and Orange. We create research-led solutions that focus on clarity to improve interactions, drive results and reduce costs.

Trading for over 20 years, we've worked on many different challenges relating to customer, user and employee experiences. We've designed guides for first-generation mobile phones, helped the UK Government understand customer expectations for IoT device security standards and supported clients in various industries to address fundamental challenges related to delivering outstanding experiences.

If you would like to learn more, take a look at the selection of case studies on our website or if you'd prefer to get in touch, please send an email to: **hello@makeitclear.co.uk**

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