Accelerate Your Customer Experience

Steven Walden

CEO AllaboutExperience
Mobile: 07956 261109
Email: stswalden@aol.com

Website: www.allaboutexperience.co.uk
Linkedin: www.linkedin.com/in/steven-walden-1baba52/

Please find enclosed my portfolio. This includes details of my experience by case study and video (www.allaboutexperience.co.uk/videos).

For the last 15 years I have held senior customer experience management roles, agency, client and vendor side e.g., Director of Customer Experience Insights at Ericsson; Director of Customer Experience at ttec digital; Head of insights and consulting (Beyond Philosophy); EMEA lead for customer and employee experience (Strativity). In total, I have designed and directed over 100 CX consulting engagements.

From these roles I have gained a wide spread of knowledge and skills that cover most of the elements of customer experience and employee led transformation e.g., CX strategy design, journey mapping and management, voice of the customer/ employee, service design, culture change, co-creation and business development.

I bring tools and methodologies designed by myself and some of the leading CX and EX consultancy and research houses as well as client side.

I am also an author, speaker and trainer, certified in NPS and Agile, with deep customer insights experience.

I hope this is of interest to you.

Kind regards

Steven Walden
Mobile: 07956 261109

My Profile

Steven Walden – Profile

A customer experience (CX) & customer strategy subject matter expert, I have run over 100 CX projects covering strategy, design thinking, journey mapping (& software), co-creation, customer success & voice of customer (VoC)/ employee. Professionally certified in NPS, CX, Ideo Service Design, Agile (practitioner), Co-Creation (Goodwill), Cynefin and Scrum Master, I specialize in setting up CX functions within firms. In this capacity, I have delivered voice of customer & employee platforms & insights (e.g., Brandwatch, SenseMaker, IBM, emotion metrics); journey mapping; CX assessments; innovation; and training to deliver culture change. An author (*CEM Rebooted*, Palgrave) & speaker, my senior experience includes client, vendor & agency roles.

See my portfolio at: www.allaboutexperience.co.uk/videos   I combine strategic vision and practical drive to implement innovative solutions led by deep insights and creativity.

- **Maersk**: increased NPS 25 points (cited by Forrester)

- **Overbury**: CX programme led to annual revenue rise of 15%, highest NPS in the sector

- **Avios**: Award Winning project (UK CX Awards) that improved loyalty point redemption 30%

- **Memorial Hermann Hospital**: increased CSAT scores 91% in poor performing hospitals

- **Aviva Insurance**: reduced call volumes by 6%, costs cut by 20%, CSAT rise from 72% to 90%

Ericsson (Director of CX): Set-up the Ericsson *Experience Management Centre*. This brought tools and techniques together in one hub to drive customer success. The practice, delivered value-add to existing clients' CX teams from (for example) KPN, Bharti Airtel, MTN, SALT, Bahamas Telecom, EE and DTAC Thailand. The strategy was fundamental to key account renewal.

TTEC Digital (Director of EMEA CX practice): Delivered channel partnerships, brand building collateral, CX training for sales, business development with key accounts (e.g., Tarmac) and VoC IP development (award winning CX Vector). Clients included FordPass, Gemalto and Tarmac. Year 1, turnover from embedded base of +£400,000 without budget and from a standing start.

Strativity Group (Director of EMEA CX practice): In 2018, I helped Strativity develop their EMEA business, building a $1million pipeline. Clients include Npower, St Gobain, Schusterman Foundation, Cadillac and Dorel. All project delivery was directed by myself as well as all training in Journey Mapping software (Touchpoint Dashboard).

Beyond Philosophy (Global Head of Research and Consulting): My IP work included award winning Project Design (UK CX Awards) with Avios; Forrester cited work for Maersk and my design of emotional measurement tools and journey mapping frameworks: delivering £6 million turnover in 7 years within CX programmes. In over 8 years I directed and designed over 70 projects

Steven is a CX exec I've known for a long while - and whose work I've known even longer - and is strong voice in the CX space in EMEA. I'm delighted to report that he is well beyond the cookie-cutter viewpoints we typically see and has the experience level to back up the depth of his work. His angle has been from both consulting and leadership positions.

Luke Williams, Head of CX Strategy and Thought Leadership, Qualtrics

Steven Walden – Projects by Brand

Voice of Customer/ Analytics: use of quantitative approaches (e.g., Emotional Signature©) that use regression and multivariate (SPSS) methods. Use of qualitative approaches that include ethnography, interviewing and focus group moderation. Leading edge application of narrative survey and analysis (using complexity sciences) and co-creation measurement (using Goodwill metrics). Platform roll-outs.

Output: modelling of predictive returns, using data and observation to identify and prioritise ideas

Journey Mapping: training in journey management, mapping and software. Includes journey mapping workshops and interviews, and design of 'think-feel-do' maps with prioritization of ideas

Output: cross-sell, up-sell prospects, identification of friction points, brand and relationship moments

CX Strategy Design: strategy roadmaps designed using internal CX assessment; business case development; governance frameworks; Target Operating Models; insights and analytics; voice of customer and employee; journey mapping; co-created ideation, vision statement design; employee and executive led transformation

Output: roadmap for the CX transformation with KPIs and benchmarks for executive and employees

CX Maturity Assessment: use of self-designed assessment approaches and tools (e.g., Ericsson A2B) to define the gap between current and desired state. This is validated with a cross-functional team.

Output: gap analysis and recommendations to support CX Strategy Design and Customer Success

Employee and Leadership Training in CX: designed on-line CX certification content in Beyond Philosophy and UK CCF; engaged CX and NPS training for Ericsson Global Sales; conducted journey mapping training in Strativity EMEA. In addition, I delivered CX training for leading companies e.g., Baloise, Virgin Media and Vocalink

Output: CX training certification to engage teams in the customer experience mindset

Human Centred Design (HCD): embedding Agile and HCD practices within programmes e.g., Avios Customer Lab, which won the UK CX Awards. With Du and Tarmac an HCD focus led to contact centre redesign, better employee engagement and removal of pain points in their Delight Target Operating Model. In addition, I pioneer new KPIs that support innovation such as Goodwill.

Output: innovations in an Agile approach and linked to key KPIs (specific to activity and strategy)

Co-Creation Workshop: building co-creation moments across the customer and employee journey e.g., workshops, executive forums, huddles and bringing customers together with clients in CX Design and Customer Success

Output: designed journey maps to engage co-creation; bringing co-creation metrics into CX roadmaps

CX Brand Vision Design: creating a brand vision that acts as a focus for customer experience activities e.g., touchpoint design, HCD, metrics and marketing

Output: designed vision statements that act as a focus for touchpoint redesign and culture change

Example Client Sectors

Does not include work pre-customer experience, omnibus studies, research studies, benchmarking studies, CTO conference with Ericsson, Global CEM study and smaller workshops

Example Skills List – Insights, Design Thinking and Employee Training

Qualitative

1. Ethnographic Research
2. Journey Mapping
3. Journey Mapping Software
4. Nvivo analysis
5. Focus group moderation
6. 12I interviews
7. Survey design and field work
8. Persona design
9. Cynefin framework

Quantitative

1. Multivariate Statistics (SPSS)
2. Field management and reporting
3. Social Media analytics (Brandwatch)
4. Social Media Dashboard (Vizia)
5. Culture metric design
6. Priortisation of ideas
7. KPI construction
8. Narrative analytics (SenseMaker)
9. Max Diff and Conjoint
10. PLS Regression Modelling
11. Emotional measurement
12. Goodwill (co-creation) segmentation
13. Customer segmentation (Factor-Cluster)
14. Q-Sort
15. Churn analytics
16. Cluster and EFA
17. Market segmentation
18. Voc/ Voe community build
19. IAT
20. Big data (Service Operations Centre)

Human Centred Design

1. Ethnographic Research
2. Looking for outliers - exaptative research
3. Looking for out of industry ideas – executive forum
4. Empathy Research
5. Observational Research
6. Immersive Empathy
7. Mystery Shopping
8. Insight Sharing
9. Double Diamond approach
10. 12I interviews
11. Persona design
12. Co-Creation workshop
13. Action planning
14. Employee led transformation
15. Storytelling prototype
16. Prototyping
17. Value proposition development
18. Service Blueprint
19. Ideation workshop
20. Journey Mapping
21. Journey Mapping software
22. HCD training

I specialize in linking continuous data with the innovation and learning cycle especially using new methods of co-creation (voice of relationship: Sir-Intel Goodwill and Cognitive Edge SenseMaker)

Employee Experience

1. **Customer Experience Training**
   - All elements of customer experience for sales, service and executive
   - Sales training in use of CX Assessments as part of Customer Success and Joint Business Planning
   - CX certification design and delivery
   - Journey Mapping
   - Journey Mapping Software (Touchpoint Dashboard)
   - Voice of the Customer and Employee
   - Co-Creation

2. **Learning Management System Design**
   - Learner Journey Maps
   - Learning and Development Centre (stand-up CX training on and offline with UK CCF)
   - Executive Forum (stand-up C-level networking with CEW and UK CCF)
   - Employee led transformation guides and training

3. **Employee metrics**
   - Analytics on voice of employee
   - Best practice culture metrics
   - Engaging employees in metric results (close the loop and employee feedback) e.g., huddles, co-created action plans
   - Co-Creation metrics
   - Use data to determine return on learning
   - Balancing investments in terms of employee effort and customer expectations/ differentiation

Video Examples of My Work

www.allaboutexperience.co.uk/videos

Journey Design

Examples of:

Journey Management – examples of customer value creation

Itaú

A large number of customers were phoning into the bank to authenticate their card. This was causing customer dissatisfaction with wait times and high call volumes

The root cause was a lack of integration between retail bank and card IVR

AMEX

Customer effort and drop out due to the need to fill out manual forms rather than phone up to join the card.

Customer lack of awareness of concierge service meant a poor understanding of benefits of the card

Customers had to call to authorize someone to act on their behalf which was not ideal

The root cause was a dependency on manual forms and processes

TARMAC A CRH COMPANY

Customers experienced, call delays, inconsistent rep knowledge, inability to find quotes, early stop orders, invoicing delays, multiple hand-offs, lack of SME empowerment, delays between contact centre and rep, lack of proactive communication, poor track and trace.

Customers liked the portal and great staff relationship

The root causes were legacy processes and inconsistent understanding of customer experience as a competitive advantage

Stena Line

Stena line received high volumes of calls due to an inability to complete ticket purchase. It was found that the obligation to provide a mobile phone to complete purchase meant issues for some customers.

Customers spent more time at port than on the ship yet services were poor (unclean toilets, poor restaurants) and signage bad.

Employees thought that customers cared about the ship experience and underinvested time and effort at on-boarding

The root causes involved: one member of the board who believed all customers should have mobile phones; lack of visibility on the importance of the port experience and inherent employee beliefs

Journey Management - Human Centred Design programmes

Project Designer and Director

Tarmac

- Developed a comprehensive process of: Internal review
- Journey mapping, ethnography and qualitative research.
- Quantitative research
- Behavioural psychology
- Employee co-creation

CX approaches embedded in existing contact centre design programmes

My Novel Approaches
Learner Journey Mapping
Co-Creation with employees

SALT (Orange Switzerland)

- Market tested Social CRM system with field engineering
- Over a two month period tested out how well **social data** led to new innovations in the network. This integrated field engineering with Vizia data from Brandwatch

The idea for integrating social data and network data was my own and demonstrated POC success

My Novel Approaches
Social CRM/ Network data integration
Network Green: Customer Red branding

Baloise / Stena Line/ Avios/ Du

- Put in place quick wins and longer term wins based on comprehensive strategic CX programme (assessment, qual and quant, journey mapping, vision and brand documents) using **outside-in** CX tools developed by myself

My IP
Emotional Signature (Quantitative)
Employee training packages

Bahamas Telecom/ MTN/ KPN

- Developed **user stories** and prioritized recommendations list based on feasibility assessment using my CX maturity IP (A2B).
- Recommendations were put into the product roadmap for Service Operations Centres (by client) or as CX led new service/ product lines integrating into Ericsson engineering

My IP
A2B maturity assessment

Outside In Focus Means We Tailor Any Designs Towards Customer Value Creation: Applying HCD And Agile PM as relevant

Redesigned contact centre operations with POC in Scotland focused on speed of response, co-location and integration with SAP. Integration of Salesforce and co-creation approach with sales teams in the field

25 key gaps in the network based on 1,300 comments over 2 months found. Need for Hootsuite application with 5 question test in next iteration. Identification of cultural programmes through social data share at tier 3

Website redesign (Avios, Baloise); inspiring email offers (Avios); POC with 23 ideas (Avios). Port experience (cleaning /signage) and website redesign for purchase (Stena). Payment tablets in queues (Du). Employee experience for all

Focus on managing pain points such as release of complaints tool (KPN), dropped call control on mobile signal (BTEC), user stories for tailoring service operations centre and better governance processes internally (MTN)

Innovation Labs and Service Design: connecting insights to action

Designed and delivered Award winning Innovation Labs using Service Design principles. I am deeply embedded in the Co-Creation movement, that aims to link customers into the innovation cycle on a continuous and Agile basis:

Context

Winner CX Awards 2013: Avios Customer Lab: outside-in approach of Ethnography, Quantitative Research and Business Case Prioritization. Conducted and designed all insights, analytics and workshops to deliver 900 requirements for improved CX brought down to 23 prototypes. Also used to deliver culture change through a key touchpoint focus and changed benchmarking
Baloise Insurance: used touchpoint management system and brand vision as the touchstone for their service design process
Other examples of Innovation Labs mixing culture change and CX innovation: Du (Pain points), Maersk, Amex, Memorial Herman, etc..
Ericsson MS Experience Management Centre: outside-in approach of CX Maturity Assessment, Business Case prioritization. Conducted and designed Joint Business Plans for KPN, DTAC, MTN Nigeria, Bharti Airtel, Bahamas Telecom and OmanTel. Used in prototype and acceptance criteria (use cases for Service Operations Centres and upsell such as complaints tool)
UK Contact Centre Forum Innovation in Customer Experience (ICE): set-up of Innovation forums for UKCCF. This matches 800 vendors with innovation designs delivered from planning sessions (co-creation) with executive workshops
IP: includes Maturity assessment in support of co-creation workshops (Ericsson A2B), emotional signature (quantitative assessment to assist in business case development and requirements prioritization), journey mapping variants using think-feel-do approaches and Social CRM (use of social media/ NPS to connect customer VoC on mobile events to field engineering)

Change

Used a qualitative-quantitative approach to deliver a set of prioritized requirements: agreed and co-created with a cross-functional design team and customers. In every case, the set-up delivered prototypes, relevant metrics (acceptance criteria) and employee culture change. A critical feature was the whole company approach i.e., not just a UX focus but also how we use continuous exploration data and employee experience / Governance to develop prototypes and culture change.
UKCCF is a direct to C-suite approach, matching vendors with CX interested parties to surface RFIs more directly

Benefit

Avios: lab initiatives led to a change in thinking internally from a Campaign-led ('Who are the best customers for this campaign?') to a Customer-led approach ('What is the best campaign for these customers?'). This cultural shift of putting the customer first is evident in simple changes to marketing planning. Another example is in testing & learning from more personalised campaigns e.g., educational DM campaign focused on less engaged members to show the value of collecting Avios and inspire them to redeem. This led to early success with 440 first-time bookings & 1,100 members signing up to receive emails. Also: most valuable members receiving complimentary Lonely Plant guides to thank them for their loyalty. This 'Surprise & Delight' led to positive feedback via social media as well as a 30% increase in redemptions.
Ericsson: Supported POC design e.g., demonstrated uplifts of +50 NPS in Bharti Airtel with SOC use case; supported crown account client retention and win such as OmanTel and Yoigo SOC implementations (over $1 million each). Defined POC upsell opportunities
IP: emotional signature supported the prioritization of requirements in lab environments and investment decisions.

SERVICE DESIGN PROCESS

identify problem/need ■   ■ analyse data
define solution space ■   ■ synthesize findings
gather user knowledge ■   ■ define brief

develop service ■   ■ launch service
detail service elements ■   ■ ensure user feedback
user tests ■   ■ share insights

(design council 2013)

Discover

Identify problem – used CX thinking (outside-in KPIs) and brand vision

Define solution space – used CX and EX as the lens for the solution space i.e., its about creating customer value holistically and embedding change at the culture level

Gather user knowledge – based on customer and employee knowledge combined with the art of the possible (co-creative thinking and brilliant VoC/ VoE.

Define

Analyse Data – deep modelling of data (emotional signature); use of self-quantified narratives. Qual-Quant, Ethnography and creative approach built on empathy and emotion data identified by Persona and As is Journey Maps. Co-Creation is used and information from Employees (e.g., wrap notes, F2F, group sessions, quant surveys). Exaptative data applied

Synthesise Findings – this uses co-creative workshops and cross-functional bodies with a view to delivery of funded prototypes

Define brief – uses prioritization process to define business case and justify investment (prioritized requirements list and acceptance criteria)

Develop

Develop service – holistic interpretation to include employees/ experience elements around service goals.   Service is delivered into Journey Maps as 'to be state'. Service elements are detailed in user stories

User tests – develop customer lab concept to trial and test against predefined acceptance criteria for each prototype

Deliver

Launch service –roll-out post prototype via iterative development (Agile PM) where relevant

Ensure user feedback - knowledge is put into continuous exploration context i.e., co-creative communities of interest, and use of external executive forums for adaptive thinking

Share insights – fits with governance framework model created at the start

Baloise Insurance - touchpoint management designed experiences

1. Initial situation and goal

The TPM score in 2012 is 90.
With the help of appropriate measures, we intend to increase this to **115** by 2015

TPM score = 115
Positive customer experiences

- TPM-project to bring CE in daily business
- Project portfolio projects with customer experience
- Touchpoint redesigns in specialized areas with TPM
- Service Champion Programme
- TPM instruments; mirrors, CEAs, safe activities, etc.

Today

2011 2012 2013 2014 2015

Touchpoint Management | www.baloise.com | 9

Strategy

Touchpoint KPIs

Actions

TPM systematically optimises the customer journey with an integrated approach on three levels:

1. Instruments
- ✓ Customer advisory board; expand to include SME customers and in all regions
- ✓ Customer experience measurement system and tracking system with TPM score, such as in the Claims specialized area
- ✓ Touchpoint relevance check for new projects
- ✓ Tool usability testing with customers for online touchpoints such as the Internet, customer applications
- ✓ Internal quality monitoring (iQM) with assessment of the impact of TPM activities

2. Measurements with indirect impact on the customer journey = implementation of the touchpoint philosophy
- ✓ Service Champion Programme
- ✓ Utilisation of Client Experience Agents (TPM multipliers) in all GL areas
- ✓ Workshops with employees using the "Goal" mirroring method: 30% of all employees have experienced a customer journey themselves as a customer with Baloise
- ✓ SAFE activities (statement regarding the customer experience)

3. Touchpoint redesigns:
- ✓ At least 12 implemented and measurable adjustments per year for a customer contact point along the customer journey (e.g. online claims form) with the inclusion of BSW

Touchpoint Management | www.baloise.com | 13

---

1. Instruments
Measure 106: Usability testing for online touchpoints

→ **What was done?**
Review of the usability requirements for various websites/online processes
Provision of infrastructure to make inhouse usability tests

→ **What was the effect/how successful was it?**
Collection of customer/employee views and requirements during three online projects
Identification of problem areas and definition of solution options

SoBa account opening baloisedirect
New intranet for Baloise Switzerland
New layout for

"We believe we know what the customers want - touchpoint management (TPM) highlights where we are and what the customer really wants"
Together with friendly cooperation, TPM provides us with a meaningful analysis that forms the basis for aligning processes and products based on needs. This has enabled us to make the online account opening process for the e-banking savings account more attractive and customer-friendly.

Pascal Brönnimann, Head of Product Management (SoBa)

1. Instruments
Measure 102: Expansion of the SME customer advisory board

→ **What was done?**
Launch of customer advisory board for private customers in 2011
Expanded to include business customers in 2012

→ **What was the effect/how successful was it?**
Around 14 customer advisory board meetings have already been held. These will enable us to obtain external views on subjects (documents, product ideas, services).

2. Implementation of the touchpoint philosophy
Measure 207: Service Champion Programme

→ **What was done?**
Launched 16 February 2012 with announcement on the Intranet
Individual information in the management areas
¼-yearly brainstorming meeting
Many ideas will be accompanied and supported by TPM

→ **What was the effect/how successful was it?**
33 ideas were registered, which included:
- 12 nominations
- 5 are being implemented and on their way to standardisation
- 5 ideas are being clarified
- 2 ideas suspended after kick-off
- 9 ideas were rejected but deemed valuable and passed on in their basic form to the respective areas for review

3. Touchpoint redesign
measure 410: online claims form

→ **What was done?**
TPM supported the Claims unit with the creation of a customer-friendly online claims form. This should help to significantly reduce the cancellation rate of around 70%.

→ **What was the effect/how successful was it?**
Significant reduction in the workload of CSCs through a reduction in the number of claims forwarded by e-mail and by telephone. The measurement results (incl. reduction on the cancellation quota) will be available by the end of July.

Experience process: Ease to report a claim

EXAMPLE: PRIORITIZATION BY (1) CUSTOMER (2) BUSINESS CRITERIA

Selection Process – Efficiency Analyses

18 attributs	6 Valuation Criterias	8 attributs

- The competency of my consultant
- The extent to which my insurance needs are covered
- The ability to satisfy a request at first contact
- The feeling to be taken seriously when complaining
- The speed in which my needs are being taken care of
- The fairness in case of a claim
- The ease to report a claim
- The accuracy of received documents
- The speed in which Baloise responds to electronic inquiries
- The ease to find information about Baloise
- The presence of Baloise on compare platforms
- The ease of adapting contracts according to needs
- The accessibility of a contact person
- The personal contact with my consultant
- The fairness when cancelling a contract prematurely (Kulanz-letting me get away easily)
- The ease of cancelling a contract
- The extent to which Baloise makes an effort to keep me after cancelling a contract
- The competency of service partners

Cost & Resources
Operational Ability
Timeline
Return
Strategy
Differentiate

Scale: 1-5
10 evaluators

- The competency of my consultant
- The ability to satisfy a request at first contact
- The feeling to be taken seriously when complaining
- The speed in which my needs are being taken care of
- The ease to report a claim
- The ease to find information about Baloise
- The accessibility of a contact person
- The personal contact with my consultant

Result of Touchpoint Selection Session 3rd of Sept. 2010

Baloise Group

www.baloise.com   26

Enhancing the Avios Experience

900	Cross-functional team ideas
52	Projects fully scoped
23	Lab initiatives implemented

Customer Experience Lab project timeline

2012 Implement Test & Learn
2013 Roll out quick wins & embed into BAU
2014 Long-term CAPEX projects

Development of Brand Vision Statements – matching CX requirements to vision

In these cases, the CX vision was established through a process of qualitative and quantitative insights: these then formed the basis for prototyping and touchpoint management

Baloise

Avios

Maersk

Other examples include:

100% recommended (Overbury)

WIT (Elior: Welcome Interact Thanks)

Brand Pillars for Amex, British Council, Barbican, Etisalat and Du

Journey Management - integration of customer centricity into existing programmes

Human Centred Design

Embedded voice of the customer, voice of employee and co-creation workshops

Output: Customer Lab prototyping of 23 ideas, mindset change, embedding of customer community for continuous exploration (400 customers), customer focused marketing campaigns

Six Sigma, Lean

Embedded voice of the customer/ employee and co-creation workshops as the lead to customer centric

Output: salesforce roll-out, co-location in contact centre operations, CX mindset training

Agile and SAFe

Used perception data (Narrative, NPS, CES, etc) data as the integration point with product and service design and Vision statement.

Output: prioritization of pain reduction prototypes, new vision statement, mindset change at leadership level

HR Processes

Worked with HR to embed employee-led transformation programmes and co-creation action plans

Output: focus on employee experience including improved working conditions based on Mandarin Oriental Hotel examples (e.g., concierge, on site simplified documentation and mindset change)

Marketing and CCO processes

Worked with cross-functional team to design the CX Vision

Output: customer experience statement that defined the to-be principles for Maersk: these were applied to touchpoint redesign, marketing messaging

Customer Insights – VoC and VoE platform roll-out

Narrative insights using **SenseMaker** platform

Measured drivers and destroyers of NPS in Delhi Circle with **Bharti Airtel** and determined uplift with service operations centre

First ever NPS survey using complexity science on narrative. Measures Non-Linear effects and dispositions

Project Lead

Social Media insights and reporting using **Brandwatch**

Integrated data fields into **EE** reporting and with **SALT** (Orange Switzerland). Used for cultural benefits of VoC to engineering. Also applied to MSF clients and integrated into SOC with **Yoigo.** Demonstrated at Mobile World Congress

Project Lead and Analyst managing and training team in UK, Romania and India

---

Ericsson Service Operations Centre platform with insights matched to NPS

Big Data measure of web browsing speed and other KPIs. Put in place NPS using social media data (social NPS): **Bharti Airtel and Yoigo**

Project Manager: responsible for market test correlating network KPIs with social data for predictability on EE

Churn Analytics using **Presidion IBM** data

Taking a data feed from **SALT** voice of employee wrap notes (contact centre reps) we used predictive analytics to determine key drivers of customer satisfaction across the customer journey

Project Lead

Emotional Signature© : emotions to CX KPIs

Over 60 engagements (e.g., Maersk and Forrester cited) used my design for measuring emotions. Based on PLS regression and Max Diff with qualitative insight of the journey

Project Director

Customer Experience Gaps – define the gaps in service delivery

Immersion with Tarmac uncovered break points in service excellence e.g., failure to accurately record instances of truck delivery (lime); issues with stop notifications (communication with finance teams); failure to build in Voice of customer (recent rep taken off duty for these responsibilities); failure at leadership level to segment by customer lifecycle and persona (very functional view of customer); slowness in response to digitalization; fragmented analytics base (multiple recordings on excel); low morale; lack of business case development for CX 2020 programme; failure in governance (considered an IT project)

Output: cadenced into existing programmes for sales and service excellence with co-location and salesforce roll-out

Immersion with Shusterman Foundation (leading charity) uncovered tactical break points in service excellence; issues of morale (staff engaging too much); lack of co-creation with volunteer staff; failure in KPI effectiveness (link between KPI and experience design); lack of balance between third party community platforms and purpose of the organization; low morale in volunteer base as lack of glidepath to promotion; lack of leverage across whole Schusterman Foundation

Output: advisory on redesigning customer journeys on charitable tours to engage the organizational purpose; a clearer glidepath and a stronger co-creative engagement with volunteer base

Immersion with Pfizer over EMEA and global locations uncovered governance disconnect between centre and regions. In particular, marketing efforts were unsupportive of in country rep activity (too centralized to be meaningful). In addition the recent CRM platform was not being used by sales and service teams – hence knowledge tended to be lost. Morale was low due to concerns on prospective job losses as there was no glidepath from existing state (transactional sales) to future state (relationship sales)

Output: advisory on new CRM platform upgrade and decentralization of marketing campaigns to local authority. Plans in place for sales education i.e., selling with customer experience

Immersion with Etisalat in Nigeria and the UAE uncovered major issues in terms of how central UAE authority was directing the CX roll-out locally. Although part of the brand pillar, there was no local governance structure in place (e.g., target operating model and culture change programme)

Output: focused on putting in place the right Target Operating Model with the production of a Vision Statement and Governance Framework (e.g.., customer experience council and board level agenda items)

Customer Success
and Employee Engagement

Customer Success - embedding Ericsson beyond the CTO with co-creation

Defined the specific use cases and KPIs that the Service Operations Centre would focus on for MTN Nigeria. This helped Ericsson in ensuring that the SOC was supporting a broad range of cross functional stakeholders demands

Defined the specific use cases and KPIs that the Danataq customer engagement platform would report on and determine next best action. This helped Ericsson in ensuring the platform was not cookie-cutter and could support the sales objectives of the CMO

Worked with a cross-functional team to define customer experience programme gaps and the need for investment in culture and NPS. This led to engaging broader strengths of Ericsson with DTAC Thailand i.e., to encourage a more integrated sales pitch and closer alignment with CX strategy

Worked with a cross-functional team to define customer experience programme gaps. This identified new sources of opportunity for Ericsson and ensured sales teams were more engaged with KPN strategy teams. Sales included, behavioural segmentation and customer complaints tool

Worked with the C-Suite to define specific pain points in their customer experience. This resulted in defining new sources of sales opportunity for Ericsson i.e., preventing dropped calls

Example A2B Customer Success Sales Tool for Joint Business Planning

Customer Success – training the sales and CX champion teams

A trained NPS and Agile practitioner

ERICSSON / ttec

- Trained Sales teams in Net Promoter and Customer Experience
- Designed Joint Business Planning approach with Sales Tool and Assessment Model (A2B)
- Developed integrated CX solutions to sell within SOC platform e.g., with perception data and customer reporting
  - Retention of crown MS accounts through improved servicing e.g., Yoigo upsell of $1 million SOC platform, retention of Bharti account
- Embedded voice of the customer data in sales planning using social media tool
- Undertook Crown Account planning
  - Year 1: £300K sales without marketing budget
- Leveraged internal networks to 'sell-up'
- Development of new IP (CX Vector)
- Built video and marketing guides, analyst papers and collateral for sales teams to use

npower / Bâloise Assurances

- Delivered customer experience training guides and marketing collateral
- Undertook two levels of training:
  - Executive level
  - Employee level
- Touchpoint management training and guide
- Insights process training
- Journey Mapping Software training (Touchpoint Dashboard)
- Extensive design of on-line customer experience training packages as well as delivery both on-line and offline with many clients
- For a full list of CX champion training see Projects by Brand Slide – **this excludes online certification training which I delivered to 20 mixed client groups e.g., RBS, SITA and other leading brands**
- Regularly undertake inspirational speeches e.g., DEC, IQPC, CEW and through my own CX Networking club

STRATIVITY – unlock EXCEPTIONAL

- Developed $1 million pipeline through a series of activities:
  - Sell To – direct marketing and black book relationships, sell to embedded base
  - Sell With – channel partners in the learning and voice of customer space
  - Sell Through – channel partners
- Segmented and identified core areas of need
- Developed Nurturing platform to engage C-level executives in face to face conversation (CX Networking Forum)
- Produced digital assets
- Year 1: £300K sales without marketing budget

Business Development Activity: driving the CX agenda

Context

Focused on driving business development in CX within start-up organisations:

Ericsson: Managed Service unit needed to react to changing client demands. They noticed major operators and crown accounts were increasingly asking for CX services.
Ttec Digital: EMEA business was set up from purchased companies RogenSi (employee experience) and Peppers and Rogers. They wanted to provide CX services based on the demands of the US holding company (TeleTech)
Strativity: a well-know Experience Design House in the USA wanted to enter the greenfield EMEA market space
Beyond Philosophy: a well-know Experience Consultancy wanted to build out their service portfolio

Change

Developed a process of:
Sell To - targeting existing embedded base and expanding out into CX with a more integrated sale. Segmented accounts by Crown account and interested buyer. Worked with sales teams to educate them and provide a toolkit for sales (e.g. A2B assessment, sales videos and thought-leadership documentation). Also engaged my own black book of contacts and a phone sales process. Activity included wrap around service IP development to assist in CX use case development for SOC platform and data analytics services to help target the CMO
Sell-With – worked with channel partners to target key accounts where a joint proposition could add value (e.g., UKCCF)
Sell –Through – offered specific service lines to partners to resell (e.g., Journey Mapping software)
Nurture – developed a CX forum approach, inviting in potential clients and others to handshake (includes conference speaking and papers)

Benefit

Ericsson: supported Joint Business Planning for Crown accounts leading to renewal of Bharti Airtel and acquisition of Yoigo and OmanTel
Ttec Digital: integrated sale embedding RogenSi (culture) and Peppers and Rogers (Opit and CX approaches) led to sale worth **£**1 million in 2 years. Nurtured and developed UKCCF learning and training academy integration (channel partner): basis for resell of 3,300 learning modules off Litmos Heroes platform as well as CX advisory services
Strativity: sales nurturing and focus on embedded base led to upselling into key accounts Npower, St Gobain as well as the holding of a $1 million pipeline

Nurturing For Customer Success and Learning: thought leadership and networking

Context

- C-Suite budget holders are interested in learning more about customer experience i.e., not just CX but also CTO, CMO,CIO and COO
- There is a limited number of platforms available that offer an independent and thought-leadership led environment for nurturing relationships and crafting new ideas

Change

- Developed with BW: Workplace Experts, Value Genie and Customer Experience World (CEW) a format of virtual and face to face events that engage C-level stakeholders in conversation with other practitioners and experts/ thought-leaders
- Engaged and supported this format with UK CCF
- Developed a nurturing environment and space for building trust and co-creation
- Developed marketing collateral and thought leadership for sponsors

Benefit

- **BW: Workplace Experts gained marketing collateral and thought leadership for their on-going programmes in customer experience management**
- **Strativity: gained nurturing, 'hand-shaking' space to develop relationships. This was crucial as the brand is new to the EMEA market**
- **UK CCF: gained access to CX professionals as they seek to expand in this space**
- **CEW: is using the forum concept as an add-on to their conferences and as a means to engage over a co-creation platform follow-on virtual events**

John Lewis: 30 customer experience practitioners brought together with 20 employee experience partners from John Lewis to discuss best practice

Tarmac: Small expert practitioner team of 5 brought together with the CMO to give confidence and action plan next steps in their CX2020 programme

CEW: forum concept used at the back-end of conferences to engage C-Suite executives

BW: 5 events per year conducted for marketing and thought leadership value

ttec: 30 customer experience practitioners brought together with sales teams to discuss best practice ideas and platforms

UKCCF: regular customer experience events that bring together experts, practitioners and operational directors with contact centres

Employee Engagement - training tools

Co-Creation Platform

Action Planning and Huddle

CX Assessment Tools

Journey Mapping Software

Virtual Training Videos and Networking events

Platform for engaging employees in ideation and Journey activities

Create co-creation action plans in huddles and track results through the platform

Online and tablet based tool for CX assessment and Joint Business Planning

Online Journey Mapping tool and Persona design through Strativity Touchpoint Dashboard

Library of educational material

Employee Engagement – training academy

Designed the UK CCF Training Academy with Trevor Butterworth

This offers customer experience training to agents in partnership with ttec Digital and executive training through the executive forum

My role is in setting up the partnership, the design of the executive forum with Co-Create and the delivery and design of the UKCCF CX certification

Launch: April 2019

Employee Engagement – partner tools and events

AllaboutExperience Network

Insights

Co-Creation & Community

Digital Learning

Contact Centre

Events

Thought-Leadership – supporting employee and leadership engagement

Thought Leadership – digital marketing, speaking, online training

Marketing e-books and Videos

Interview Library

Speaking and Online Training

Conference Speeches

Online Webinars

Analyst Interviews

Thought Leadership – customer experience author

Steven Keith

Steven, your CX Rebooted book is stellar. I've really enjoyed reading it and have had more than a dozen epiphanies as a result. Thanks for writing a book that cuts through to the other side. I genuinely applaud your work. I just recommended it to an audience of 150 people I keynoted. Hope to run into you at one of these events someday. We're of like mind.

David Pinder

We are at a moment in time when technologies are at last enabling businesses to make the profound shift from doing things 'at customers' to doing them 'with customers'. This doesn't just impact Marketing and Sales but, rather, every function, real and virtual, in the demand chain. All of which makes Steven Walden's book timely and important. Important because it breathes new life into the CX argument at a time when it was becoming fossilized. Important because it clearly identifies and explains the subjective nature of CX: "Customer experience is the experience the customer has". Important because it clarifies and articulates the intimate connection between Customer Experience and Customer Value, and the management of both of those domains. I think this book is terrific.

Example Articles published for Value Genie and ttec Digital

- Finding Strengths in Weak Signals is the article behind the CX Vector IP I created with Director of Insights, Peter Dorrington. Based on my insights work in Agile PM and SenseMaker

Thought Leadership - see www.allaboutexperience.co.uk/videos

Case Studies

PATIENT EXPERIENCE

British Heart Foundation

CX Assessment of BHF, defining the gaps in existing programmes

NHS Elect

CX training in best practice customer experience
Delivery assessment of NFIT

Healthcare BELGIUM

Redesign of healthcare system using co-creation and goodwill metrics

MEMORIAL HERMANN

Journey Mapping the existing hospital experience, creating prioritized requirements list

MERCK

Roche

Quantitative Assessment of emotional drivers and destroyers of value in patients with Type 1 and Type 2 Diabetes

NUTRICIA Advanced Medical Nutrition

Journey Mapping the existing experience and training on Touchpoint Dashboard

McKESSON

CX assessment of It services implementation in Englewood Hospital

Pfizer

European CX assessment of Pfizer experience

Improving Customer Satisfaction: Memorial Herman Hospital System (MHHS)

Context

- MHHS is 11+ hospitals (3,500 beds) with 20,000 employees
- Customer Satisfaction drives a large percentage of government sponsored reimbursement for hospitals in the USA
- Reimbursement is crucial for hospitals to recoup the cost of care
- Every percentage point rise in CSAT above 75% represents $1.4m
- MHHS provides more care than any of its competitors
- A typical Hospital had Patient Satisfaction scores of about 81%.

Change

- Redesigned the MHHS experience via Journey Mapping, Data Analytics, co-creation and practitioner training
- The end result was a revamp of MHHS' inpatient and outpatient Cancer, Heart & Lung and Emergency Room experiences
- Approved experience designs were placed on the calendar

Benefit

- On average, Patient satisfaction scores in the hospitals increased by:
  - 91% in poor performing hospitals
  - 12% in great performing hospitals
  - This translates to an additional $10m revenue

When Product Innovation is not an Option: Yorkshire Water

Context

- Bottom of the OFWAT (regulator) Customer Service League Table (being on top of it means you can charge premiums)
- Low perceptions (water shortage and bonuses scandal)
- Increasing customer expectations
- Facing the threat of competition
- Toughest pricing review since privatisation

- "Yorkshire Water has turned itself from one of the most ridiculed companies of the late 1990's to one of the most respected" - Financial Times, December 2002

Change

- Facilitated the development of a customer experience via
  - Senior leader workshops to define CX Vision and Strategy
  - Training call centre and field staff on how to implement the new initiatives
- Remove measures such as "call duration" and "calls waiting", so agents can focus on problem resolution and a caring attitude
  - To close an issue to satisfaction on first call costs £2-8 compared with £60-70 to send an engineer in a van

Benefit

- **£8.5m of cost savings as a direct result of CX improvements such as:**
  - **40% reduction in written complaints**
  - **20% reduction in repeat calls**
  - **Calls closed on first contact > 70%**
  - **50% reduction of unnecessary field jobs**
  - **Appointments within 2hrs - 98%**
- **Improved overall CSAT from 53%-91%**
- **Ranked 1st in OFWAT Customer Service League table**

Increasing NPS Score: Maersk

FORRESTER®
Best Practice Citation

Context

- Large container shipping company with offices in over 100 countries and 20 000+ employees
- The boom in the shipping sector between 2001 and 2006 increased investment in vessel capacity but with the crisis in 2008 the markets stalled
- Over capacity within the shipping industry was eroding margins and leading to price competition
- **How do you differentiate and exit the price competition vicious cycle?**

Change

- Root-cause analysis of NPS data lead to improvements in: (1) Ease of problem resolution (2) Customer service (3) Accept booking via multiple channels (4) Proactive communications etc.
- Business case design based on quantitative data and identification of key drivers to NPS (e.g., through Journey Mapping and Quants identitifed, Shipping Notifications
- Persona design and Journey Mapping
- identified 'active care' and reduced negatives (avoiding confusion and stress) as fundamental to increases in Net Promoter
- CX Assessment: (1) Introduced CE metrics as KPIs (2) Appointed CE Ambassadors who would own the customer experience and implementing measure to improve it (3) Customer Experience Workshop to define the vision for the new experience
- Engaged in quantitative analysis, IDI and focus groups and Journey Mapping and ideas prioritisation
- Comprehensive CX Ambassador training enabled globally
- Vision statement design and set up Governance structure

Benefit

- **Net Promoter Score increased by 25% points (from -10% to 15%)**
- **As a result in 2010 the company was in a better position to capitalise on the market activity rebound and reversed a $2 billion loss to $2.6 billion profit**
- **Employee Led Transformation: 55 regions with customer experience councils scored 10 NPS points higher than non-participating offices**
- **4 point increase in NPS correlated to 1% increase in additional shipping**
- **Defined the intended customer experience**

Increasing Loyalty Points Use: Avios

UK CUSTOMER EXPERIENCE AWARDS WINNER

Context

- The Avios vision is to become global leaders in travel rewards by 2020. The interim target is for the Avios Travel Rewards Programme in the UK to increase active members currently collecting Avios by 6% in 2015.
- In terms of customer engagement metrics, the business is focusing on increasing advocacy for the brand amongst members by 5% points by the end of 2013.

Change

- 1 day workshop: with 30 colleagues to map out the end-to-end Avios experience. Colleagues also attended the member focus groups. This helped cement buy-in A further workshop arrived at a list of key experiences to test. Analytics tested how Avios was performing across 44 key end-to-end interactions. This led to a survey with over 2,500 Avios members across key customer segments. This established 4 areas of focus.
- 1 day workshop: to brainstorm quick wins and large-scale initiative. Brought to life with ethnographic research.
- The output was an astounding 900 ideas prioritised into 52 which the Steering Group evaluated; either through test & learn or roll-out of quick wins or to plan in long-term capital expenditure projects for 2014. The Group recommended that 23 initiatives were to be prioritised and implemented in 2013 with £600k secured as additional funding to make these opportunities a reality.
- A Customer Experience 'lab' was set-up.
- One of the initiatives was to listen to members. This led to the Avios Advisory Hub - an online community of 400 Avios members which has enabled the business to gain a deeper understanding from members on the 4 areas. It has allowed a two-way conversation to help co-create solutions that will refine existing initiatives. It will also help drive more long-term solutions.

Benefit

- A step change in thinking from a Campaign-led ('Who are the best customers for this campaign?') to a more Customer-led approach ('What is the best campaign for these customers?'). This cultural shift of putting the customer first is evident in simple changes to the marketing planning process, where alongside ROI measures a campaign will also achieve approval if it can address at least one of the 4 focus areas; which has helped CX enter business as usual
- Test & learn: personalised campaigns such as educational DM campaign focused on less engaged members to show the value of collecting Avios and inspire them to redeem –led to 440 first-time bookings & 1,100 members signing up to receive emails
- Another initiative, involved sending the most valuable members complimentary Lonely Plant guides in February 2013 to thank them for their loyalty. This 'Surprise & Delight' activity led to positive feedback from members via social media as well as a 30% increase in redemptions. Both initiatives have exceeded expectations with increased member engagement but also the success of opening up more of a dialogue.
- Implemented (via its Brand Tracker survey) a basket of measures to evaluate the affect on each of the 4 focus areas as well as provide the business with a single Customer Experience metric to benchmark its overall performance against

Getting the Basics Right – getting rid of negative emotions: Aviva Insurance UK

Context

- As a leader in the industry, they needed to alleviate the public's negative image of the insurance market
- They aimed to differentiate by Customer Experience
- 3.5 million customers contact Aviva each year

Change

- Analytics used to identify pain points and critical incidences. This included customer journey mapping, focus groups, IDIs and quantitative research
- Findings revealed 'a confusing process of claim with 23 touchpoints'; 'poor web process' and difficulties with outsourcers.
- Identified areas for positive engagement e.g., before customers told a policy 'should arrive in 5 business days' this led to 75% call-backs, this was changed to 'will arrive in 7 business days'. Calls dropped to 6% saving $Millions ; on replacement of a child's seats, they included a free Aviva Teddy Bear

Benefit

- **Aviva CSAT levels rise from 73% to 90%**
- **Costs cut by 20%**

What's Next When Your On Top of Your Game: Overbury

Context

- Started "Perfect delivery" Customer Experience initiative to deliver projects on time, snag free and delight clients
- Revenues rose 40% as "perfect delivery" went from 24% to 60% in the 1st year of project
- In 7 years their revenue rose by 170% and moved from 4th to 1st in market share
- The fast growth brought some problems: (a) competition began to copy "perfect delivery" and was catching up (b) the perfect delivery of projects got stalled
- The company was on top of its game but was facing the possibility of a downward trend
- To keep the upward trend they needed to take their customer experience to the next level

Change

- Addressed the formulation of the new CX strategy by conducting:
  - Internal research to understand the current thinking
  - Quantitative research to get customer insights and generate hypothesis and qualitatives (journey mapping, Nvivo)
  - Data analytics to test the hypothesis with customers and generate statements
- The "Customer Experience Vision" initiative was launched based on 3 pillars:
  - Product – Make it
  - Process – Make it simple
  - People – Make it engaging

Benefit

- Annual revenue increased by 15%
- Increase "perfect Delivery" from 91% to 96%
- The Net Promoter Score has increased significantly to reach 70% (one of the highest not only in the sector but also worldwide)

Align Service Operations to a Customer Centric Focus: Bharti Airtel

Context

- The Indian market is highly competitive with challenges of poor perception of network quality, growing complaints via social media and escalations from VIP customers to the CTO. However, the operator lacks visibility of the service quality being received by subscribers. Operators require a long term solution to understand the root cause of service issues and poor customer perception, with recommendations and business case for NPS improvement. The operator required Ericsson to incorporate an existing CEM system into the EMC, to ensure existing investments were optimised

Change

- Ericsson's A2B Engagement process was used to understand the strategy, pain points, activities and tools used by the operator to deliver their CEM vision. This identified how to align Ericsson MS CEM solutions, the development of use cases to align to operator's customer experience strategy and target customer pain points
- Developing a tailored EMC solution to complement the existing customer experience management capability, incorporating the operator's existing infrastructure and covering both inside-out & outside-in views of experience
- In addition we rolled out a field survey to test the pre and post effects of the SOC implementation : this was unique in its use of narrative surveys together with NPS (based on the SenseMaker platform). This was the first ever use of complexity science approaches with NPS and was designed to pick up non-linear brand effects (i.e., signal perception is influenced by halo effects)

Benefit

- Use cases developed for Web Browsing and 3G Voice mobile broadband services, for VIP customer segments in Delhi
- Voice of the Customer, NPS and Social Media Analytics implemented to provide in-depth customer insights. This also had cultural benefits to the engineering team: provides type /number of customer impacted due to service degradation
- Identification, root cause and recommendation when service degradation or poor customer perception is identified (use of brand term Network Green: Customer Red)
- NPS improvement of up to 50 points for optimized areas of network in Delhi

Reducing Churn Using Voice of Employee Data: SALT (Orange Switzerland)

Context

- SALT (Orange Switzerland) were facing high subscriber churn with network related complaints representing 18% of customer service issues.
- Churn models were degrading in predictability however new sources of data from voice of the employee (call centre wrap notes) represented a proxy and unused data set

Change

- The trial used our Churn analytics solution, MSAP (managed service analytics platform): this gave historical analysis of reasons why customers churned or planned to, established how to improve the product, service design or experience for existing or future customers
- Analytics allows Salt to be self-sufficient once the data models have been defined and included the use of structured / unstructured data.
- Trial analysed 695,200 messages from 295,587 subscribers

Benefit

- **Predictive analysis** of customers liable to churn linking this to products or services that can be offered via personalised marketing campaigns
- **Analysis by segment, Customer Lifetime Value** (CLV - The present value of the future cash flows attributed to the customer during his/her entire relationship with the company) & profitability, who to keep and let go
- **Analysis of Customer Behaviour, and predictive trends to avoid losing key customers going forward**
- Analysis of Customer Satisfaction, Loyalty, Advocacy/Recommendation including NPS as a means of predicting churn
- Analysis of Network Performance of Service KPIs not achieving SLA in any particular area, or region and the propensity to churn for key customer segments
- Trial findings: *30 key categories that linked to propensity to churn, all categories helped fine tune churn models for greater accuracy and led to the development of campaign management*

Growing Market Share Left the Customer Experience Behind: DU

Context

Du had grown market share from 0% to 32% in the space of 2 years. However, due to this fast growth aspects of customer experience had been overlooked. This meant a rise in complaints and low employee morale. While early success had been due to price-sensitive pre-paid customers, it was now essential to create a 'memorable' experience for the wealthier customer segments

Change

Du undertook an internal assessment of their customer experience culture and capability to deliver. This led to a reworking of governance and employee experience with an emphasis on empowerment and leadership commitment. In addition, a quantitative assessment of the experience was conducted to define the best ROI together with journey mapping to redesign the new experience (244 ideas were prioritized to 95 with user stories). Finally a new vision was created as a focus for investment which was graphically translated to explain to employees.

Benefit

Post-paid subscriber base grew 109% in one year, while share from the overall customer base grew from 4% to 7%. The overall mobile communications market share of the company increased from 32% to 42%. The operating margin also improved 7% for the period.

Setting Up a Customer Experience Centre of Excellence: Ericsson

Context

Ericsson MS (Managed Services) were receiving increased interest in their customer experience portfolio from global operators. They required a senior industry expert to help them set-up the Experience Management Centre and determine its products and services.
Setting up the Experience Management Centre in Ericsson Managed Services, involved negotiating and dealing with a heavily matrixed and political organization.   The critical point was to cadence CX activity towards the aims of functional units.

Change

A set of CX tools and techniques were applied with relevant training to teams in Romania and India:

CTO Stakeholders:

Used NPS to ensure engineers were customer centric
Used complaints data to predict major network issues
Used field wrap notes to predict major network issues
Used Service Operations Centre data to predict bad cells
Used NPS data to demonstrate uplift from SOC POC
Used NPS to understand mobile signal degradation
Used social media data to identify hidden network issues
Used new language (Network Green: Customer Red) and data share (narratives in SOC)

CMO Stakeholders:

Development of use cases with Danataq
Used contact centre wrap notes to identify friction in the end-to-end customer journey
Used narrative data to demonstrate impact of emerging trends on the network

Sales Stakeholders (Customer Success)

Set-up CX Maturity Assessment framework and toolkit for use in sales discussions. This defined co-creation upsell and crosssell opportunities with key accounts and help integrate business lines across

Cross-Functional Governance:

Conducted Journey Mapping workshops with cross-functional teams
Set-up Governance structure to engage senior-team
Developed employee huddle approach
Set-up Executive Forum to invite stakeholders to learn from other industries

Benefit

Ensured contract retention and upsell. Developed strategic loyalty in crown accounts:

OmanTel: formulation of use cases
DTAC Thailand: support for CX teams with roll-out of NPS
MTN Nigeria: formulation of use cases
BTEC, KPN: upsell
SALT: identification of friction points
Bharti Airtel and Yoigo: predictive NPS in SOC

Building a Customer Centric Use Case: Yoigo

Context

European Tier I operators have purchased fixed line operators, enabling them to offer Quad Play in Spanish market. Spanish market has a large number of MVNOs which offer niche services attracting particular market segments. Operator needs to find ways of retaining customers and generating more revenue; key strategy is to create a valued experience for customers when using operator's services

Change

A2B Engagement process was used to understand the existing operator vision, pain points, activities and tools used to deliver their CEM vision. Identification of capability gaps and alignment of Ericsson MS CEM solutions with the operator; development of use cases to align to operator's customer experience strategy and target customer pain points; developing the EMC solution, incorporating the operators existing infrastructure, where required ; Incorporating both Inside-Out and Outside-In services driven by use cases to deliver an end to end view of CEM

Benefit

- Use cases developed for Web Browsing and 3G Voice mobile broadband services, for key customer segments in major Spanish cities
- Voice of the Customer and Social Media Analytics implemented to provide in-depth customer insights
- Integration to Customer Care and NOC to provide more focused reactive troubleshooting and proactive analytics
- Partnership approach with payment schedule based on measurable service quality performance improvements

Using Customer Experience to Stay Relevant: Baloise Insurance

Context

Baloise Insurance is one of the strongest insurance providers in Switzerland. However, it is facing the challenge of digitalization and new entrants into the market. It is also hidebound by a legacy and fairly old fashioned approach The company wanted to develop a more customer centric focus to compete effectively as the market changes

Change

Customer experience engagements to define the best strategic approach and infrastructure set-up for new CX unit:
1. Set in place a full time project manager on the ground to work with the team
2. Undertook business (CX assessment), customer experience insights (ethnographic, vision creation and statement, IDI and focus groups, quantitative research and segmentation, journey mapping and co-creation, KPI formulation, prioritization of ideas, marketing and brand collateral and employee training).
3. Produce a CX roadmap for the business around 8 principles, CX Ambassador training and toolkit, Touchpoint Management playbook and KPI measurement system
4. Quantitative analysis using field survey against a basket of emotional, NPS and CES metrics
5. Qualitative research and analysis using Journey Mapping, Focus Group Moderation, Ethnography and the use of Q-sort in results prioritisation

Benefit

- Designed Baloise SAFE guidelines and approach
- Benchmarked Touchpoint improvements
- Put in place instruments (customer advisory board, CX measurement system, internal quality monitoring); Employee experience (service champion programme, Client Experience Agents, Goal Mirroring (30% of employees experience a journey); Touchpoint Redesigns (12 implemented and measurable changes
- 14 Customer Advisory meetings held in Year 1
- Completion of usability testing for online requirements
- Collation of online feedback on performance
- 60 employees complete Touchpoint Philosophy training
- Service Champion Programme registered 33 key ideas at launch of which an immediate 5 were progressed
- Customer friendly online claims forms produced that reduced cancellation rate of 70%. Which also reduced contact centre workload
- Customer friendly realignment of content

Getting CX Training to Stick: Royal Bank of Scotland

Context

- NatWest, a division of the Royal Bank of Scotland. One of the largest financial institutions in Europe, offers retail & corporate banking, mortgages, insurance, telephone and Internet banking. Have over 1,650 branches and over 25,000 staff.
- Many staff saw customer service as an "add on" to their role. They had already undertaken some Customer Experience work but it was not taking hold with employees

Change

- Discover the reasons the program was not taking hold. Asked employees:
- Their understanding of Values & Services Program and how positive they were about the message?
- What they thought the obstacles were?
- What they were doing about it?
- Revamp training workshops

Benefit

- Undertook Experiential learning with staff: based on data that the concept of customer experience was not well understood and not referenced to their day job.
- Experiential learning include a Safari of stores and locations to understand best practice alongside practitioner co-creation

Post Workshop Effectiveness

| 100% | 100% | 100% | 94% |
| This workshop has enabled me to understand what I really need to do to implement and improve and | I now understand what I now need to do to improve the Customer Experience | I would recommend my colleagues to attend this workshop | I now feel my action plan has improved and is robust |

Understanding the Drivers and Destroyers of Experience: Barclaycard

Context

- Barclaycard is one of the leading credit card companies in the UK
- The market is very crowed and pushing profits down due to competition.
- Recently repositioned brand with new advertising campaigned but realised their experience didn't match the brand promise
- Barclaycard were interested in understanding which KPIs they should measure and focus on in their customer experience redesign programme.

Change

- Designed and delivered a comprehensive measurement programme engaging customer surveys of emotional response alongside a bundle or metrics: NPS, CES, Brand, CSAT and spend data. In total over 5,000 interviews undertaken and regression/ conjoint modelling undertaken
- Designed the touchpoint measures by use of journey mapping with over 50 cross-functional stakeholders from inside Barclaycard
- Emotional Research: used to identify the attributes that drive or destroy value across the 6 steps. Key emotions uncovered that lead to value related to Care
- Journey Mapping: used to identify the 6 key steps of a customer journey
- Findings revealed that "humanic" touchpoints (e.g. call centre related) and the website experience are crucial to business value: as a result the website was redesigned and the focus was shifted to personal interaction improvements via changing agent's metrics; "using my card" step of the journey showed to be least emotionally engaging: as a result, initiatives relating to designing this part of the journey were prioritised

Benefit

- Delivered an empirical and grounded focus for Touchpoint Measurement and Re-design going forward
- Attitude towards brand positioning in UK improved by 12%
- US Barclaycard ranks third in overall customer satisfaction in the J.D. Power and Associates 2011.
- 30-point improvement in performance compared to previous year

Experience Re-Design of the Contact Centre: Tarmac

Context

- Tarmac are delivering their CX2020 transformation programme in response to market moves by players such as CEMEX
- As part of this transformation, the CMO and CX transformation team were looking for advice on how to develop to the next stage of customer centricity in particular, how they could enable their current IT roll-out plans to be customer ready.
- While the company had various programmes in play such as e-Pod, they were unclear on the actual needs wants and expectations of customers and how employees could fit in

Change

- Undertook a series of interventions across the RMX, Aggregates and Asphalt estate focused on procurement and rep interaction
- Ethnographic research
- Persona design
- Journey Mapping
- Immersion – cadencing existing programmes with customer experience research
- Voice of the customer research using narrative insights
- Voice of employee research
- Analytics model (Delta)

Benefit

- Identified failing contact centre environments
- Co-located sales and service rather than have them separated
- Roll-out of salesforce
- Segmentation into 3 distinct experience with smaller (by sales) companies engaging more digitally than through rep

COE Journey Mapping Training: Standard Bank

Context

- Standard Bank are one of the lead banks in Africa. They wanted to build a cross-functional centre of excellence (COE) in Johannesburg focused on CX champions trained in Journey Mapping and methodology
- Undertook an internal Journey Management process to identify key stakeholders and key journeys, personas and stakeholders of interest

Change

- Undertook a Journey Management and Mapping approach in Uganda, Nigeria and South Africa across the retail journey for 'getting a mortgage' and 'closing an account
- An omnichannel mapping exercise was constructed across family based personas using consultants and locals
- All results were captured and documented in graphical journey mapping charts (think-feel-do)

Benefit

- Standard Bank central CX Champion team were trained in Journey Mapping and Mapping research methodology through delivery of actual maps from the field
- Within these we identified and co-created key interventions across the designated customer journey especially in the retail, online and contact centre space

Training Journey Mapping: NPower

Context

Npower have a team of 20 in their customer experience unit. As they expand the unit out to CX champions through the group they want to have a standard and consistent methodology around Journey Mapping and host an IT infrastructure for any maps and personas produced i.e., to ensure sharing and consistency.

Change

- Undertook a 2 day training course with 30 staff on Journey Management and Mapping methodology including the use of Journey Mapping software to an advanced level

Benefit

- CX teams host 10 licences for the Touchpoint Dashboard software and have a fully trained team in Journey Management and mapping
- Removes inconsistencies in mapping approach and provides the basic infrastructure for the upcoming focus on customer centricity

Training Customer Experience: Standard Chartered Bank

Context

Standard Chartered Bank in Hong Kong, wanted a company to deliver training in customer experience for all their regional offices . The aim was to ensure a customer centric culture and the right use of CX tools and methodologies

Change

Hong Kong Disneyland was chosen as the experiential setting for the CX training
Staff were selected from over 10 countries in the region
Training was set for 2 days with a safari tour of Disneyland to experience best practice CX design

Benefit

- Fully trained and certified staff in customer experience
- Training comprised: Journey Mapping, CX Vision design, CX KPI formulation, CX service design process, employee experience and Governance, insights processes
-

Designing a Customer Experience Centre of Excellence: Ericsson, ttec digital

Context

- Many companies are interested in extending their portfolio into customer and increasingly employee experience. But what does this mean and how should they approach the market to establish a footprint?
- Ericsson MS – wanted to build a CoE targeting CTO and CMO (beyond the CTO) with new data analytics and extension of the network
- Ttec Digital – wanted to build a CoE targeting HR, CIO and Contact Centre with omnichannel solutions

Change

Ericsson
- Built out a set of integrated solutions that embedded a customer centric mindset within sales teams i.e., education and training so they could demonstrate capability within their Service Operations Centre sales cycle including better understanding on NPS as a key metric of interest; built key tactical actions to embed the voice of the customer into network engineering i.e., Network Green – Customer Red branding, embedding of Social Media and NPS narratives into SOC display; Design of customer success toolkit through maturity assessment to upsell and cross sell in key accounts and crucially to design customer-centric use cases around the platform sale (SOC); embedded EEA (data analytics and churn analytics) into the solution portfolio

Ttec
- This focused on supporting crown accounts within the RogenSi (employee experience) portfolio. This led to sales training in customer experience, segmentation and targeting with sales teams on accounts where we could reach the Contact Centre Director (e.g., Telefonica and Tarmac). This also meant designing some new IP (emotion metrics) as a means to stand out in data analytics in the contact centre
- My approach was focused on integrating approaches and methods applied in the USA into EMEA region

Benefit

- Ericsson Sales Teams accredited the approach to crown account renewal and bringing into play stakeholders beyond the CTO e.g., Bharti Airtel, KPN, DTAC Thailand. In addition, built use cases around the customer for SOC release (e.g., Yoigo $1million platform sale). New IP demonstrated the value of social and churn analytics data and its potential for upsell (e.g., SALT)
- Ttec Digital Sales teams accredited the approach to winning £700K of new business through offering solutions beyond the provision of tactical staff training (this was from a standing start). Deepening of the analytics portfolio also delivered with insights new sales of over $1 million within the banking environment
- As start-ups within larger organisations substantial activity was put into delivering channel relationships e.g., UK CCF as a channel to sales within unreached contact centres. Also, brand building e.g., papers and videos with leading analysts and thought leaders such as Joe Pine and through use of Peppers and Rogers (ttec Digital) Customer Strategist magazine

Designing the Brand Pillars: American Express

The single minded purpose of this project is to create a seamless, delightful customer experience. Our objectives are:

- To perform an in-depth audit of the customer experience we currently deliver
- To move from transactional interactions to emotional interactions, complementing the work by Linguistic Landscape
- To implement new/enhanced treatments based on the recommendations, which will drive loyalty and spend

Business problem to be addressed

| High attrition rates | Perceived value /quality of service | Ability to retain fee paying CMs |

Desired output

Shareholder	Customer	Employee
✓ Reduce voluntary attrition	✓ Be proud to hold the Card	✓ Empower our employees
✓ Drive and diversify spend (industries and Blue Box)	✓ Be happy to pay the fee and recommend to others	✓ Equip them to deliver an outstanding experience

Context

Change

Focus on:

- Journey Mapping and Ethnographic research around the Platinum and Centurion Cards
- As is and To be designs
- Internal review and assessment of Target Operating Model for CX
- Use of Quantitative research and regression modeling within the prioritized requirements list

Benefit

Design of Brand Pillars around:

Make me feel special
Get it Right
Know me

Delivery of prioritized attributes for service design
KPI metric measurement bundle designed against brand pillars

Superior Experience with the Right KPIs: Turkcell

Context

Change

Benefit

TURKCELL

Leadership Challenged	→	Challenged by a new contender
Market Believed To Be Saturated	→	Leading to competition for growth
Differentiation Needed	→	Turkcell leadership didn't want to wage price wars and sacrifice margins
Competition Caught Up	→	Superior network advantage eroded, competition caught up in coverage & network performance. New technologies adopted by other players & offered less of an advantage
New Customer Centric Model	→	Chose to compete in the Customer dimension & made a long-term commitment to the customer-centric competitive model

A2B Training | Commercial in confidence | © Ericsson AB 2014 | 2014-06-01 | Page 16

An assessment using **a Capability Maturity framework** resulted **in a roadmap and a portfolio** of 20+ projects in the first 12-month phase.
A **Quantitative modelling approach** that was set at the heart of the Turkcell move from Frictionlessness to Delight ('Superior Experience Everywhere')

The key to Turkcell's approach then was to be comprehensive and to follow a customer centric strategy i.e., over the three competing sets (operational efficiency, product superiority and customer intimacy), customer intimacy was key (requiring in its delivery, great products and an optimal resource allocation and cost focus) with Turkcell values set to the brand.

TURKCELL

Customer Insight Strategic Priority	→	Capabilities built up to world-class, using advanced analytical models, market-leading tools and valuable in-house talent.
Advanced Lifetime Value	→	Combined with needs segmentation & included in Customer Centric activities aligned by segment strategies. Processes, centrally designed/ governed
No investment was spared in design and technology	→	Match technology capabilities & information architectures to high demands of customer-centric operations. Focus on designing great experiences: 'superior experience everywhere'
Organization design adjusted >1	→	Massive culture change effort involved company-wide communication, education and motivation, resulting in a lasting customer-centric ethos to support evolving processes and enable behaviors
Evolved Measures	→	Alongside traditional metrics like TRI*M and NPS, new metrics like CES and a Loyalty Index; all combined in comprehensive scorecard models for continuous multi-dimensional measurement.

Growth;
- 13m – 30m subscribers,
- Continued to 70M,
- No.1 in 6 of 9 operating countries
- 30+% EBITDA
- 18% FCF (free cash flow)
- 1 of the best performing telecoms stocks on the NYSE market

A2B Training | Commercial in confidence | © Ericsson AB 2014 | 2014-06-01 | Page 19

Integrating Voice of the Customer and Employee into the Contact Centre

Context

- Contact Centres are under huge pressure to adapt to a more complex omnichannel and digital environment.
- This has led to two effects:
  1. A focus on frictionlessness and the transfer of linear processes to AI and RPA based on least cost compliance
  2. A focus on customer experience as a differentiator and the consequent impact on the required employee experience
- In addition, there is a growing acceptance of customer experience metrics and augmenting rep performance with data analytics (single view of customer)

Change

Contact centre experience includes working for ttec Digital, one of the worlds largest contact centre BPOs, as Director of Customer Experience. This involves engagement with omnichannel projects such as FordPass (digitalization), Tarmac (close the loop, service and operational excellence) and Ericsson (managing the gap between tier 3 network engineering and Tier 1 customer facing staff. A particular focus is the people and culture side as well as voice of the customer/ employee e.g., training Ford staff to be customer experience guides, the set-up of the Cadillac CX training in the contact centre to represent brand moments

Benefit

Examples include:

- integrating best practice voice of the customer analytics in the contact centre with DTAC Thailand (NPS assessment)
- integrating voice of employee (contact centre wrap notes for churn analytics) with SALT (Orange Switzerland)
- integrating social media CRM into Network engineering SOC platforms for cultural change and analytics purposes (Yoigo, Bharti)
- mindset and culture change in the contact centre employee base with CX training (Cadillac)
- operational efficiency review (Tarmac)
- integrating customer data and a customer centric culture between tier 1 customer service and network operations (Ericsson)
- CX and NPS Assessment approaches into contact centre environments (KPN and DTAC Thailand)
- embedding contact centre operations into strategy and Governance e.g., Capital One (experiential listening), American Express and American Water (process improvements) and Bharti Airtel (culture)
- Providing benchmark metrics on contact centre performance for Turkcell, MnS and many other brands e.g., quantitative survey and social media performance for global CTO membership services in Ericsson

Supporting a Customer-Centric *Digital and Omnichannel* Transformation

Context

Focused on bringing customer centricity into the design of the omnichannel journey across People, Process and Technology

Avios – ensuring that the website and omni-channel environment was customer centric e.g., content distribution, look and feel of website, engagement levels on home page and through email offers

AXS – ensuring that the omni-channel experience was customer centric across the journey e.g., browse, buy and use including removal of friction and identifying areas to improve levels of engagement

Tarmac – ensuring that the omnichannel environment was fit to match the CX 2020 vision e.g., contact centre huddles (voe), use of VoC data in close the loop, co-location (pods), expansion of the role of customer portal for information

Bharti Airtel – using analytics to determine the effect of customer experience on brand performance e.g., customer service. Using big data (SOC) to improve NPS by reducing cell degradation. Undertaking Social Media benchmarking.

RAC – performance review of digital and omnichannel service in situations of recovery

British Gas – quantification of online touchpoints, application of predictive analytics and journey mapping

Du – mapping the experience and identifying technology fixes for moments of pain

Social CRM – applied social data through scraping the Internet to identify network issues (SALT, EE)

Maersk – use of technology to improve proactive notifications with delays in port

Change

Omnichannel and digital transformation has focused on least cost compliance to the frequent detriment of the customer experience. By engaging in a customer and employee centric value focus, any friction caused by digital transformation is identified and removed. Underperformance and moments of delight are likewise identified in the design of the digital and omnichannel transformation e.g., move from AHT to FCR, repositioning of website content, employee experience training in CX

Benefit

Time benefits from re-working of ease of calling (down from 2 minute delay to less than 30 seconds)

Prioritization of investment on digital assets improved e.g., content reworking of flight map from 3rd step to front page with Avios; reworking of emails to sell destination rather than hotel to improve upsell

25 network related events captured in field engineering through social CRM (SALT) and identification of 80% failure in customer care follow-ups from social media enquiries (i.e, lack of tier 1 to tier 3 integration)

Use of big data analytics (mobile data on signal integrity, accessibility) to determine predictive cell degradation and application of VIP use case

Identified use of data for marketing purposes e.g., video download speed upsell and marketing messaging at events

Use of contact centre wrap notes to identify 30 root-cause issues and 18% network related churn problems (SALT)

Examples of Innovation

And IP Development

Social CRM Identifies Network Issues : SALT (Orange Switzerland)

Context

- SALT (Orange Switzerland) were facing high subscriber churn with network related complaints representing 18% of customer service issues.
- Social Media was used to identify network issues not seen through the measurement of functional KPIs (Integrity, Accessibility and Retainability of mobile signal)
- Social Media was seen as a real-time data layer that could add value to network engineering

Change

- A friendly MSCOO team was identified for the Agile proof of concept
- Language was modified to encourage participation: Network Green- Customer Red; adding in a new data layer; enablement of historical transational analysis
- A prototype was designed in support of a 2 month sprint with a team including operations
- During the 2 month trial, 1830 mentions were analyzed with the main purpose to identified network issues based on the feedbacks received from the end users on different social media (Twitter, Facebook). Samples were extracted using the Brandwatch platform with an algorithm that scraped text to identify intention to leave network and disclosed network issues

Benefit

- 25 network issues, on different areas, were identified through Brandwatch Tool and analyzed by Optimization team over the last 2 months. Issues include cell blindspots outside Basel Train Station i.e., functional KPIs would not have noticed due to lack of base station
- Recommendations: HootSuite automated response via Care that asks 5 questions e.g., indoors/outdoors; timestamp; exact location. Enables correlation to engineering data (network and handset)
- Side benefits of integrating Social Media data into the service operations centre include:
  - Encouraging engineering teams to read narratives real time from customers (cultural benefits of customer centricity which leads to reporting on customer impacts of network outage)
  - Capability to follow VIPs (through Klout score)
  - Ability to cross compare networks via Social NPS; encouraging real-time narrative surveys on outage to determine transactional NPS/ CES impact
  - Significant collation of marketing data e.g., from events such as Rugby World Cup (168,000 posts with opportunity for upsell if cross compared to SOC data with cell ID number)
  - Social CRM added to the SOC platform and seen as a means to engage field sales in learning about operators as well as a sales prospect for early stage SOC clients

Facebook vs Twitter

63% Facebook
37% Twitter

Network issues

4% 4% 4% 4%
20%
64%

Coverage
Data
Drop calls
Edge
Power
WiFi

Data Analytics Identifies Failure of Close the Loop in Care: 30 Operators at MSEF

Context

- The Managed Service Executive Forum (MSEF) is a premier event in the Telecommunications calender
- Ericsson wanted to showcase the advantages of Social CRM and how it might encourage a more close loop integration between Tier 1 care and Tier 3 Network engineering
- This supports the approach to using the 'Network as an Experience Platform' (Walden, Joe Pine)

Change

- Over 30 operators provided with a report on social media performance demonstrating a failed link between Care and Engineering.
- Ericsson trained teams in Romania and India to put Social CRM via Brandwatch Vizia platform into the MS product portfolio
- Used best of breed real-time Social Media Analytics; trained 'query designers' in Global Service Centres to develop deep queries to extract 'network comments' from the noise of marketing, service and brand
- Delivered Social Media perception of the S-KPIs, and other requirements e.g., data is visually appealing, 'alerts' and generates a list of key Net Promoter (NPS) detractors and ViPs; multiple competitors can be assessed at once; Scalable

Benefit

| Network Issue Topics | Last 7 days |
| Common Issues | Last 7 days |

Data Speed	583
Streaming	425
Line Quality	26
Dropped Calls	2

All Issues Sentiment Volu... — Last 7 days
Issue Breakdown — Last 7 days

Twitter User	Twitter Followers
@GrandPalaisRmn	282200
@FredCavazza	153231
@eric_twittando	138938
@nashwaa	116646
@nadialamlili	104411
@kirstinestewart	35623
@EricRoberts	34835
@FBrahimi	23238

- Sets up a dashboard based on Mobile Signal categories 'Accessibility, Integrity and Retainability'
- Social NPS and narratives included in dashboard (including any surveys)
- Sets up VIP list

· These can be added to the S-KPI VIP list as relevant

37% Engaged by Lime
63% Not engaged by Lime

27% Engaged by Orange UK
73% Not engaged by Orange UK

- Identifies breakdown between network issues raised with Care via Social Media and those comments not engaged
- In nearly all cases there had been no integration with Engineering

How Can We Measure Emotion: emotion analytics informs business decisions

Context

Change

Benefit

- Customer experience is frequently premised on emotion, yet businesses fail to build predictive models based on emotion
- As Head of research and consulting I built emotion measurement approaches using academic rigour and deep statistical approaches
- This led to Emotional Signature©, a Forrester reference emotion measurement tool (one of the first in the market), used by many brands and building £6 million of revenue in 7 years
- Used to develop a 100,000 database on emotional response

- Using Structural Equation Modelling (PLS regression), Max Diff (conjoint overlay), MVA (SPSS) and based on emotion theory (academic literature), I developed a process of measuring emotional response via scaled survey: an initial ethnographic and journey mapping approach determined the touchpoints of interest based on 'think-feel-do'. I amended emotion theory based on results: all of which formed the research behind the CX book: DNA of Customer Experience: how emotions drive value)
- The approach set out a model of 'stimulus – effect – response' to determine the predictive impact on key KPIs
- In ttec Digital I further developed the emotion analytics approach with CX Vector (based on the work of Cognitive Edge and Peter Dorrington). This used Narrative and was runner up in the UK CEM Awards 2018: a critical feature is the mix of big data, vector surveys and journey mapping

- Emotional Signature© has been used as the CX KPI tool of choice to determine investment decisions, touchpoint prioritization and key KPIs for the following example brands:
  - Maersk (Forrester Cited)
  - Avios (won UK CEM Awards 2013)
  - Baloise Insurance
  - Du
  - Etisalat
  - Stena Line
  - American Express
  - Tui
  - British Gas

CX Maturity Roadmap: used for Co-Creating up-sell and cross-sell

Context

- Ericsson Managed Services was a new player in customer experience facing an entrenched competitor in Huawei that was actively upselling
- They wanted a scalable strategic methodology that their sales teams could use to help surface opportunity in Joint Business Planning conversations; CX use case development for their Service Operations Centre and as a means to open conversations 'beyond the CTO' e.g., with CMO, CIO, COO, CXO etc

Change

- I designed a co-creation and strategic approach called A2B
- This was a maturity assessment tool and methodology that Sales teams could easily apply either in pre-sales or in Joint Business Planning via an 18 Question App (with associated marketing and thought leadership collateral)
- The approach also leant itself to consulting revenues since the team could go in and assist CX teams in clients to understand the gaps in their existing programmes

Benefit

- Added value to SOC sales: OmanTel,MTN, Yoigo and Bharti are $1 million sales each that embedded an A2B approach in order to tailor use cases
- New upsell and cross-sell: through consulting services that used A2B in KPN , SALT, DTAC Thailand, BTEC we determined new sales opportunities such as NPS Assessment, Complaints Tool, Behavioural Segmentation and outbound roaming
- Extended connections beyond the CTO: in all cases we used the approach to engage beyond the CTO. For instance, undertaking as a global team workshops with the C-Suite and training sales teams in the use of the approach for Joint Business Planning and reaching out to other areas of business

SenseMaker and Cynefin: 'first ever' NPS study using complexity science

Context

- Bharti Airtel were wanting to understand NPS better especially since they had a 'Network Green-Customer Red' problem with mobile signal
- Ericsson were stating this as a problem of signal (accessibility, integrirty and retainability). By contrast I raised the issue of brand halo.
- Ericsson invested in a comparison study across a specific Bharti Airtel cells in Delhi India.

Change

- To investigate Brand Halo and employee culture effects on mobile signal perception we used a method of non-linear narrative analysis (SenseMaker). This uses Cognitive Edge principles (Cynefin and Complexity Science)
- We applied this over a base of 1,500 customers and used modelling to determine the linkage to predictive effects
- The survey was unique in being the first global NPS survey to ever use complexity techniques
- The survey used self-quantified narratives and vector based approaches to metric development i.e., the KPI more stories like this fewer stories like that

Benefit

- Determined that mobile signal perception was influenced strongly and significantly by non-linear effects: early billing and customer service
- Narratives enabled better interpretation of signal benefits in use (i.e., rather than just 'get a signal' but when Bharti Airtel performance is a memorable benefit
- Determined that high scores on NPS were actually not meaningful and more a reflection of continuity of use (promoters do not promote, detractors do not detract)
- Found that narratives worked well with Service Operations Centre platforms (to encourage sensitivity to the customer)
- Set up better KPIs and an alert mechanism for changes in perception
- Using Cynefin framework, we mapped out ideas for innovation using the engineering team

Recommendations

Peter Dorrington
Inventor of the CX Vector, I am a Board-level adviser on Data, Analytics, Customer Experience & Omni-Channel Operations
November 23, 2017, Steven worked with Peter in the same group

I found Steven to be a great source of inspiration and knowledge about Customer Experience. His ability to explain and engage, leveraging his extensive knowledge of the field, got me started on thinking about customer insights / analytics in a completely new way. A pleasure to work with, Steven both supports and challenges others to achieve more than they can alone. See less

Gary Journeaux
Managing Director at Competitive Pest Services: AUSTRALIA'S BEST PEST CONTROL SERVICE WINNER, FOUR TIMES OVER
July 14, 2013, Gary was a client of Steven's

We had the pleasure of working with Steven when he accepted our invitation to come to Australia and talk us through the customer experience. Steven really knows his stuff, and we produced many great insights on the day. I would have no hesitation in recommending him if you want to further enhance your customer experience. See less

Kalina Janevska
Director of Research and Insights at ENGINE | Transformation
May 19, 2013, Steven was senior to Kalina but didn't manage directly

Steven is a highly creative individual, excellent at solving problems in unconventional ways.
He continuously keeps up to date with the latest innovations in statistics, design and psychology and vigorously experiments with the traditional customer experience approaches.
Steven is also an exceptional independent worker and is able to successfully run and execute projects end-to-end. One of his strengths is building client relationships based on trust and loyalty. Steven is a great contributor to any team that strives to achieve customer experience advancements. See less

Qaalfa Dibeehi
Customer Experience, Digital Experience, Customer Insights, Lead, VP, Head, Director, EMEA, Global
April 8, 2013, Qaalfa managed Steven directly

Steven is a true innovator in customer experience. We developed Emotional Signature together on the foundation of research he conducted into emotional enagagement in commercial settings. Steven is a person you want on your team when you need a creative approach to a difficult problem. Steven's approach to consulting is refreshingly straightforward: (1) understand what the client wants (2) figure out a way to deliver it and (3) make it happen. One of his greatest strengths is that he is a JFDI type of person. He is on the opposite end of the scale from a procrastinator. Once Steven hones in on a task or project, consider it done. Steven has been a huge asset to Beyond Philosophy. As a direct result of his work, Beyond Philosophy has been able to carve out a niche and differentiate itself in the ever expanding customer experience competitive landscape. See less

Rebeca Miranda
at Aviva Digital Garage
August 10, 2012, Steven was senior to Rebeca but didn't manage directly

Working with Steven has been an unforgettable experience. Steven is a natural innovator, a passionate explorer in a permanent hunt for new ways of doing things. He is inspiring, he shares and puts no limits to his ideas. He stimulates creativity wherever he goes because he thinks out of the box innately.

Steven is one of those few people who are able to create a whole new product from scratch. A beautiful mind sprinkled with a wild wittiness. Steven is a treasure very rare to find, someone that meets the creativity and passion of an artist with the rational understanding of an statistician. See less

Alan Bergstrom
Chief Marketing Officer at Community First Credit Union - Appleton Wisconsin
June 18, 2012, Steven worked with Alan in the same group

I had the distinct pleasure of working with Steven during my tenure at Beyond Philosophy. Without question, Steven is one of the smartest, if not the smartest, Customer Experience experts I have come to know. He has a tremendous skill for thinking innovatively and creatively about Customer Experience applications. He is constantly pushing the boundaries in the development of critical methodologies for measuring and evaluating Customer Experience performance. Steven is truly a thought leader and a great asset to the profession.

I am proud to call Steven a friend. I rely on his deep knowledge, insight and advice for all things Customer Experience related. See less

Astrid Caspari PMP, LSS-BB
Business Excellence Black Belt at Huhtamaki
May 3, 2012, Astrid reported directly to Steven

Steven is an incredibly creatively thinking individuum who has the will and the brilliance to create methodologies in research that do work, and that do reveal short-comings to their customer experience- and he will find the solution. It was the best school for thoughts in my life I went through- I would take on any project, irrespective of cultural settings or challenges, as I know with him being in the team it will work out. See less

Kevin Dixon
Financial Transformation Team Leadership Coach
July 7, 2011, Steven worked with Kevin in the same group

Steven is a great colleague and deep thinker with tremendous insights into the dynamics of the consultant/client/customer experience. He is a trusted leader in his field, always open to learning and developing practical solutions focussed on clarity of purpose and organisartional integrity.