

# OPTIMISING THE USER EXPERIENCE FOR OPERATIONAL EXCELLENCE



It's a rallying cry that rings out from a thousand keynote speeches: put the customer experience at the heart of everything you do. Nobody, in any area of the business, should make a decision, buy a new application, capture and analyse data or devise a new marketing campaign without evidence-based knowledge of its likely impact on the customer – whatever stage of the journey they happen to be at.



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# EVERYONE'S A CUSTOMER

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But we're all customers. And most of us would be hard pressed to recall experiences that suggest the company we're buying from completely understands what we want, and matches that knowledge with products, services, campaigns and communications that are tailored to our requirements – no matter how fast-changing or exacting they happen to be.

So why is it such a challenge for many organisations to realise the ideal of a holistic view of the customer experience, treat it as an organic concept, and ensure that it is continuously optimised in the interest of operational excellence? The theory is established.

The practice remains a logistical and often cultural challenge, dependent on the breaking down of stubborn barriers, for B2C and B2B companies alike.



# TRADITIONAL BARRIERS

Traditional solutions – often investment in a wide range of marketing and sales technologies – struggle to deliver because they are implemented in ways which reinforce barriers rather than opening up the system’s potential as platforms which allow the entire operation to be customer focused.

In her [perceptive blog post](#), Turning Customer Information into Actionable Insight, Forrester analyst Laura Ramos considers the untapped value of Big Data, and says that dynamic customer profiling is something all marketers should get excited about.

“It’s the type of technology evolution, when coupled with the right marketing practices, that is closing the gap between the amount of data available to us as marketers and our ability to get value from it,” she says.



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Laura Ramos, Turning Customer Information into Actionable Insight, Forrester



# A ROLE FOR EVERYONE

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But the onus is not just on Marketing to realise that value. Sales, IT, HR and even Finance have a great opportunity to capitalise on it, and to collaborate across the business in ways that can have a significant impact on a constantly developing and improving customer experience – and ensuring the consistency of interaction, at every possible touchpoint.

This is a point explored in detail by Marcel Barrera in his slideshow on [Customer Experience Strategy & Operations Transformation](#). “Rich CRM applications drive revenue and experience in tandem, producing predictable, measurable results,” he writes. But without attending to the silos of accumulated knowledge, any business – no matter how committed to the idea of ‘transformation’ – will find it hard to reap those results.



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Marcel Barrera, Customer Experience Strategy & Operations Transformation

# THREE-PRONGED APPROACH

Barrera breaks down the benefits of a more collaborative approach, generating information that transcends barriers and individual processes, into three areas:

**Marketing** (knowing where products crop up in customer ‘conversations’, a better understanding of what is driving every interaction, being better able to improve brand affinity across every channel and touchpoint).

**Sales** (being able to respond immediately to more detailed knowledge of customer decisions/reactions at every stage of the journey, spotting concerns when they first arise, and maximising every opportunity to close a sale).

**Operations** (HR can use information to create centralised scorecards so that every employee has something to play for in the drive towards a better customer experience, and create e-learning programmes that reflect and champion transformation; the call centre can segment calls in more sophisticated ways; the business can have a greater understanding of the impact of the customer experience on its efficiency).



# THE VALUE OF CONSISTENCY

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Paying attention to them all, in equal measure, will deliver a host of operational benefits, from improved customer satisfaction and the prospect of first contact resolution, to improved business processes, reduced Days Sales Outstanding (DSO) and, crucially, the delivery of consistent performance across the business.

‘Consistency’ is the key word here. But when many businesses are complex mixtures of systems, communications channels, processes and departments used to a certain degree of autonomy, where do you begin the drive to refocus the organisation around a model based on customer experience rather than simply sales? And how can you ensure that the new model will last? It could be time to refresh those traditional roles – particularly when it comes to marketing and sales.





# MARKETING TYPES

Lynn Hunsaker, for example, claims there are [10 ways in which marketing ops can create value for the business](#), ranging from automation and metrics to predictive modelling, agility, fire-fighting and strategic intervention.

Combining them all in one individual might be a tall order, but the CMO should certainly be looking at ways to identify and enhance these capabilities wherever they lie in the organisation, and to weave them into the complete marketing operation.

But when it comes to translating customer experience into operational excellence, three of her personas stand out:



## Customer Conscience

The marketer who strives to keep everything customer-focused rather than self-serving, aims for omni-channel consistency, and stamps on anything that might jar, damage, cause delay or set premature expectations in the customer experience.



## The Connector

The marketer who understands the benefits of an integrated, horizontal view of data, processes and workgroups and their interaction with the customer experience.



## The Resource Expander

The marketer focused on cutting out duplicate expenses, making better use of existing investments (in technology, particularly), and developing better relationships between every department with a stake in the customer experience and finance.

# SALES TYPES

Unlike marketing operations, sales operations is a relatively new concept for many businesses. But it's a function that could equally benefit from a holistic focus on the customer experience. Success will depend on avoiding the restrictions and barriers that could easily let sales operations become a dumping ground for a ramshackle portfolio of vague functions for which nobody else wants to take responsibility.

Eric Bauer makes three basic [recommendations](#) to avoid this happening:

With the big picture in place, you can then establish best practice for extracting, analysing and using the right data to improve the sales operation – with customer experience insight providing some of the most important information.

Posing the question, '[what's the right role for sales operations?](#)', content marketing specialist Colin Fong offers another trio of tips, each of which depends on the quality of shared information from multiple channels:



1. Let your sales strategy inform the design of your organisation; build a cross-functional team and begin articulating a sales strategy from the ground up.



2. Develop a charter that defines the vision, scope and objectives of your sales operations.



3. Align every function within your remit to the sales strategy.



1. Improve conversion rates



2. Shorten the sales cycle



3. Maximise win factors

# DIVERSE SOURCES

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That shared information is captured from increasingly complex and diverse sources, beyond the data captured at customer touch-points. It could include non-personal, identifiable data, from third-parties such as demographic and seasonal contexts, as well as more sophisticated and semantic data which gives insights into customers' emotions and life events, gathered by different teams and campaigns at any stage of the customer journey.

The cross-boundary systems and tools that enable the capture, access to and interpretation of this data – the traditional preserve of IT – are of growing strategic importance. If the business is to deliver tailored interactions, so the customer only sees what's appropriate, relevant or most tightly matched with their requirement, at any particular moment, the systems that hold the data must be accessible to the right people. The consequences need to be fed back to improve future experience, and enable more streamlined operations.



# THE SCIENCE BIT

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It's a challenge that is thoroughly discussed in a McKinsey article on [Cracking the digital-shopper genome](#), in which the authors Gadi BenMark and Maher Masri describe the fragmented efforts of most organisations as "like scientists decoding one set of chromosomes while ignoring all the others".

They suggest that companies which effectively consolidate insights into a complete picture of their customers – and engage with them across multiple touchpoints consistently – boost their revenues by 10-20%.

The article also sets out the need for a good balance between IT (CRM, of course, but a system which addresses the wider remit of bringing customer insights from ALL sources into one place, rather than just acting as a repository for records and interactions) and people.

It's the people who hold the key – if they are led by teams of 'cohorts': cross-departmental leaders who oversee every phase of customer engagement, with the capacity to harmonise touchpoints and channels using real-time analytics.

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# PEOPLE POWER

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“Since technology is the foundation of this capability, these teams have dedicated support from the company’s marketing technologists to help navigate complex build-or-buy technology decisions and find the most effective solutions,” write BenMark and Masri.

People can kick over the traces, bringing about greater collaboration between different disciplines, operations, hierarchies, departments, technologies, and even philosophies, which might previously have been at loggerheads in the business.


The starting point for this transformation has to be a full audit of the customer experience – breaking it out of the silos – and the definition (or in some cases re-definition) of intra-departmental roles and responsibilities.

The first is practical and should be repeated regularly once the immediate goals of transformation have been realised, so that every employee considers the customer experience in every decision that they make.



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# CULTURAL ADJUSTMENT

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The second focuses on the business's people and its overriding culture. As customer experience management pioneer David Jacques outlines in a refreshingly jargon-free [guide to the transformation process](#), it reflects back into every area of the business: from HR, which can use the information to streamline its hiring and development strategy, and build reward programmes which reflect the business's customer experience goals and values; to IT, which can enable the better gathering, analysis and exchange of previously siloed information – and make well-judged technology investments in line with the same goals, as and when the business is ready to embrace new tools and platforms.

In the end, says Jacques, it comes down to the cultural embedding of customer experience in every area. And only when the whole business is galvanised behind it – led from the very top - can the extensive benefits of transformation be realised in a customer experience model that is optimised for operational excellence.



# TAKEAWAYS

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With the right approach to collaboration and a united vision of customer experience, your business could boost revenues by 20%.



Move customer experience out of the silos and get everyone thinking about how their decisions impact on the business's vision - and the information they need to make more productive and efficient choices.



Build a customer experience model that can be reiterated and applied to new campaigns and strategies as they emerge.



Make IT investments in line with customer experience objectives, as and when stakeholders are ready to embrace them.

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