CUSTOMER EXPERIENCE: FROM STRATEGY TO EXECUTION

To bridge the gap between customer experience strategy and successful execution, organizations need to align operations and deliver user-centric solutions.
CASE STUDY: EXECUTING ON STRATEGY

A global leader in wealth management had failed twice in its attempts to execute a critical customer experience strategy: a customer-centric online wealth management channel for high net-worth investors. Instead, the firm had more than a dozen aging, customer-facing websites, each owned by a different business unit and each requiring separate login. Not surprisingly, an assessment by EMC® Consulting found extremely low usage by the targeted population. Industry benchmarking confirmed that rather than leapfrogging the competition as it intended, the company had fallen behind its peers. In addition to a poor customer experience, the data views presented to financial advisors were incomplete and inconsistent with what customers saw online. The company was also paying unnecessarily for redundant, complex backend systems.

EMC consultants conducted business analyses, presented objective findings, and applied user-centric, requirements-driven methodologies to build consensus among business unit managers with competing concerns about the placement and positioning of their products. A PMO was established to provide a single point of governance for workstreams and to oversee internal and external teams, including offshore resources. EMC drove an iterative and collaborative design and development process, including rapid prototyping and wireframes to test user experience and refine requirements. Business processes, requirements, rules, and data elements were linked for full traceability.

Today, all products and services are unified in a single wealth management channel with single sign-on, robust multifactor authentication, synchronization of client data with other applications, advanced user features, and unique advisor/client collaboration tools—including the ability for financial advisors to deliver personalized information directly to their clients via the channel. The brokerage has also adopted EMC’s model for ongoing governance, maintenance, and development of its new channel. In addition to dramatically improving the experience and brand perception of its highest value customers, the firm has reduced operational expenses.

This paper, the second in a series, looks at ways to accelerate and drive processes required to execute a customer experience strategy such as gaining consensus, determining requirements, and rapidly prototyping, developing, and deploying game-changing solutions. For more information on developing a customer experience strategy, please refer to: EMC Perspective: Creating the Right Customer Experience.

OVERVIEW

Companies in the communications, media, and entertainment industries have long recognized that the right customer experience can be a sustainable and differentiating advantage in a rapidly changing and highly competitive market. As a result, most are investing in the development of game-changing customer experience strategies.

To be successful, there needs to be continuity between the teams responsible for defining the customer experience and those responsible for implementing it. Organizations must also have the skills required to design and develop the solutions and tools required to deliver the customer experience they intend.

Commitment across the enterprise is essential, as are user-centric solutions that empower staff and provide customers with convenient self-service options that transform the experience. Both operational alignment and enabling tools are necessary if a company wants to succeed in going beyond strategy and catapult itself to market leadership with differentiating customer experience.

BRIDGING THE GAP

Communication, media, and entertainment companies invest considerable money, time, and effort devising differentiating customer experience strategies. But that is only the first step.

Companies that are successful in implementing well engineered customer experience initiatives are able to bridge the gap between strategy and implementation by ensuring that careful consideration is given to the following requirements:

• Operational alignment—Delivering a consistent customer experience across channels and customer touchpoints requires a high degree of shared purpose, coordination, and integration across multiple organizations; objectives, investments, processes, systems, and organizational metrics need to be aligned across functions
• Enabling tools and solutions—Delivering a new or improved customer experience usually requires the design, development, and implementation of new, “user-centric” features and solutions that enable staff to deliver the intended experience objectives, and customers to find information, recognize value, make decisions, and opt for the convenience of self-service
• The right resources and skill sets—Organizations often need additional expertise and resources to manage enterprise customer experience programs and to create user-friendly solutions for both internal users and customers in a timely manner

Awareness of potential issues in these areas and quick action to address them are important. Experience shows that the longer it takes to execute a customer experience strategy, the more likely the initiative will lose momentum and miss its go-to-market window.

OPERATIONAL ALIGNMENT

While it is possible to make point improvements in customer service through focused initiatives, achieving sustainable brand differentiation through customer experience requires end-to-end coordination and collaboration across the enterprise.

Successful customer experience strategies typically span product design, marketing and sales, purchasing transactions, provisioning, service delivery, billing, ongoing customer support, and upsell.
For organizations that have evolved functionally, the challenges to achieving cross-enterprise buy-in and coordination fall into three main categories:

- **Business alignment**—Establishing governance, budgets, authority, internal metrics, and incentives that are connected to customer experience
- **Operational alignment**—Closing gaps between business processes and operating models; resolving cross-channel issues; and giving customer-facing employees the training, flexibility, and authority to quickly address customer needs
- **Technical alignment**—Replacing silos of technology with standardized and enterprise-wide capabilities and tools (e.g., Big Data analytics, master data management, infrastructure architectures) that link processes and make data more accessible, meaningful, and actionable

With proper alignments, an organization will be able to implement a customer experience strategy that includes the required coordination and information-sharing, and the automation of processes across channels, functions, geographies, and the customer lifecycle.

**ALIGNMENT THROUGH PROGRAM MANAGEMENT**

Alignment starts with the establishment of a Customer Experience Program Management Office (PMO) team that oversees all aspects of strategy and implementation. The PMO builds the business case for investment in the customer experience program to gain executive sponsorship and provide the foundation for enterprise-wide buy-in. It also provides a single point of accountability and control for all aspects of planning and overseeing implementation of the customer experience program. These can include:

- **Single, integrated plan**—Gap analyses between future and current state can provide the basis for requirements definition and, ultimately, the development of a high-level plan setting forth the product/service, process, people, technology, and operational changes required to meet customer experience objectives
- **Stakeholder participation and buy-in**—Identification and participation of stakeholders is an essential step in gaining the cross-functional buy-in required for the success of a customer experience program; the involvement of a broad spectrum of key players, at all levels, in strategic and tactical decisions about new products, pricing, technologies, automation, and so on facilitates commitment and consensus; participation in decision making increases the likelihood that multiple organizations and teams will make the investments and changes needed to meet customer experience objectives; broad participation also provides a “reality check” from those most familiar with current practices and constraints
- **Documentation and cross-enterprise communication**—Customer experience initiatives provide an opportunity for everyone in the enterprise to better understand their roles in meeting customer needs and expectations; documenting and communicating decisions and progress toward customer experience goals is important for workstream teams, but also valuable in creating a customer-centric culture

**CUSTOMER CASE STUDY: MASTERING DATA**

A global broadband and telecommunications company wanted to improve the quality of digital interactions customers were having on its corporate website. The client recognized that its customer data was not sufficiently integrated to support this and other strategic customer experience objectives, but was unsure of how to move forward.

EMC Consulting, with board-level sponsorship, worked with CIO, CTO, CMO, and VP of Customer Information to quickly develop a master data management (MDM) strategy aligned with business objectives. EMC consultants expedited the definition and documentation of future-state customer digital experience requirements and developed reference architectures and processes for an MDM platform. They evaluated different technical approaches to MDM and researched different vendor platforms. EMC presented the client with a shortlist of MDM platforms and developed solution designs using selected vendor platforms.

Within weeks, the client’s team had an integrated business strategy, tactical execution roadmap, and technical designs, along with a comprehensive assessment of vendor platforms and final recommendation.

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**DRIVING CONSENSUS**

As important as stakeholder buy-in is, without discipline, the process of gaining active participation and consensus can easily become bogged down and rob initiatives of momentum and focus.

Skilled collaboration facilitation, planning, and program management maintain the balance between broad stakeholder involvement—and keeping efforts on track to meet objectives and go-to-market time horizons.
Consensus-building techniques include:

- Agreeing first on program governance principles and norm, including roles and responsibilities, decision-making processes, criteria for prioritization, general timeframes
- Researching and acknowledging constraints and limitations upfront—and re-prioritizing and adjusting resources and/or expectations accordingly
- Leveraging executive leadership and milestones, such as scheduled presentations to boards and executive councils
- Rapid prototyping and user feedback
- Methodologies for group collaboration, decision-making, documentation, and communication

COLLABORATIVE BREAKTHROUGH
GAINING CONSENSUS AND COMMITMENT TO A DETAILED CUSTOMER EXPERIENCE BLUEPRINT—IN JUST WEEKS

EMC Consulting uses a proven methodology called Collaborative BreakthroughSM to accelerate consensus-building and decision-making for Customer Experience initiatives.

Collaborative Breakthrough uses facilitated workshop session(s) with stakeholders to rapidly define and prioritize activities—and gain the resource allocations and other commitments needed to achieve customer experience objectives across channels and touchpoints.

An outcome of the workshops is a clearly defined, detailed and agreed-upon “blueprint” that documents activities, priorities, timing, resources, budgets, expected benefits, and return on investment. The blueprint is owned by the primary stakeholder, communicated across the enterprise, and provides the basis for a Customer Experience Program Management governance model.

The Collaborative Breakthrough methodology has helped many Fortune 500 companies to:

- Quickly explore and narrow down a wide range of options
- Prioritize investments and new product development efforts
- Establish appropriate service options
- Define customer-facing solutions and internal business intelligence, technology, and tools
- Develop targeted acquisition and marketing campaigns, channels, selective pricing, and product strategies

ENABLING SOLUTIONS AND TOOLS

Executing a customer experience strategy often requires the development and deployment of new solutions and tools. New tools may be needed for internal staff, such as a business intelligence platform that enables an organization to react in real time to customer trends, behaviors, and/or expectations—or they may be tools, which customers will use directly, such as a web service to streamline a transaction; saving the customer time.

Success depends on how well tools are designed to perform the required function; how intuitive and easy they are to use; whether they are delivered on time; and the quality of training and programs in place to prepare and transition users/customers to use the new tool.

Common reasons for not being able to deliver the required functionality within time and budget constraints include:

- Stop/start efforts and resource commitments across the project (not planning for all phases of the project—e.g., requirements definition, design, deployment and orientation, and training—upfront)
- Lack of input from and interim testing of solutions by intended users (customers and/or staff)
CUSTOMER CASE STUDY: ENABLING THE CSR
A regional telecommunications provider, offering a wide spectrum of wired, wireless, and Internet products and services, wanted to reduce churn, improve customer call center support experience, and convert more support calls into successful upsell sales.

EMC consultants worked with the client to assess current operations and found that:

• Customer touchpoints (e.g., the call center and website) did not provide consistent product and service information
• Silo-based, tactical initiatives resulted in fragmented solutions, duplication of effort, and ineffective use of resources
• Quality of customer call experience depended greatly on the knowledge and call volume of the individual customer service representative (CSR)

EMC Consulting helped the client establish a PMO; map customer experience across channels by customer type, segment, and value; devise an enterprise-wide customer experience strategy; and develop the business case for investment justification. Among the initiatives was a single Customer Information Repository for use across the call center, web, retail channels, and other touchpoints and new tools to provide CSRs with both fast access to the right information to improve service and sales—and feedback on their performance based on objective metrics.

User-centric design methodologies, including iterative input and review by CSRs were used to define technical requirements and develop the new agent tool. EMC developers used Microsoft technologies, including SQL Server Integration Services to stream performance data with 60 different metrics into a single SQL Server Analysis Services cube and then present the analytical information in four role-based dashboards (Executive, Call Center Operations Management, Supervisor, Individual Agent) via a SharePoint portal. Key performance indicators (KPIs) include call handle time, abandon rate, hold time, time-to-answer, and sales, in aggregate and by agent. In addition to automated reports, users can drill down for details by line of business or individual agent, perform their own “what if” analyses, and create ad-hoc reports. As a result, agents at the point of customer contact have been empowered, processes streamlined, and the allocation of resources optimized to improve profitability and operational efficiency.

• Underestimation of expertise/experience/resources/methodologies required for solution definition, design, and development (e.g., user-centric design, rapid prototyping, development, testing)
• Lack of, or underestimation of resources and support required for deployment (e.g., data migration, rollout, documentation, communications, training)

RAPID DEVELOPMENT OF USER-CENTRIC SOLUTIONS
The development and delivery of user-centric tools that enable game-changing customer experience require expert project management and knowledgeable, experienced resources.

Proper project management begins with planning, resource commitment, and milestones to meet objectives on time and on budget. It spans:

• Requirements definition, based objectives, user input, and technical environment
• Solution architecture (e.g., data model, built-in security, business intelligence reporting)
• Functional specifications
• Prototyping and testing
• Training and implementation

To meet customer experience ease-of-use and time-to-delivery objectives, resources with experience in user-centered design and rapid development methodologies are especially important.

Good design uses visual cues, typography, color, and iconography to make information easier to find and understand—and to reinforce desired behaviors. Studies show that tools that leverage user-centered design methodologies to provide easy-to-use, intuitive interfaces can cut transaction time in half, improve productivity, and save costs. Creating interfaces that balance customer needs and business needs can, however, be challenging, as everything from complying with corporate branding guidelines to addressing a variety of user roles with diverse skill levels, can present seemingly competing demands.

Agile and rapid development methodologies use short, iterative cycles of prototyping, testing, and review with stakeholders and users to make sure the delivered solution meets functional and interface expectations, while reducing time-to-delivery.

SOLUTION DEVELOPMENT SERVICES

SUPPLEMENTING INTERNAL RESOURCES—OR TAKING FULL PROJECT MANAGEMENT RESPONSIBILITY
EMC solution development teams bring together experts with extensive practical experience in user-centric design, information architecture, rapid and agile development methodologies, and in the communications, media, and entertainment industry.

EMC uses a phased approach that involves users throughout the process to deliver intuitive tools and solutions with the right functionality, quickly.

Services include:

• Requirements gathering and validation via interviews and workshops
• Interviewing users, assessing current processes, and creating a concept model
• Developing visual designs and information taxonomies
• Preliminary designs for testing, using process flows, wireframes, and prototypes
• Review and testing with users
• Experienced project management to deliver required functionality on time and on budget

SUPPLEMENTING INTERNAL RESOURCES
Often internal organizations have other priorities or do not have resources with the experience to program manage or implement the execution of a customer experience program.
CUSTOMER CASE STUDIES: DIFFERENTIATING THE DIGITAL CONSUMER EXPERIENCE

As more and more customers do business with companies via digital devices, the ability to meet or exceed the expectations of the sophisticated digital consumer is critical.

- **Navigation**—One of the world’s largest map producers wanted to push “what’s possible” in making its maps available to consumers. Based on proof of concept, they selected EMC Consulting to design and build a fully interactive mapping application using Microsoft Silverlight technology to deliver extremely smooth and responsive navigation and richer plotting, points-of-interest (POI), and pull-outs. Other Microsoft technologies facilitate integration of e-commerce partners offering their own search and routing services.

- **Look-and-feel**—A fashion retailer with an early online presence found its older, front-end Flash technology was limiting web access. EMC consultants worked with the client to conduct behavioral profiling, to segment customers, and to analyze online and in-store merchandising display trends. To cut development times and costs, the site was built on EMC’s Digital Commerce Platform (DCP), which combines Microsoft Commerce Server 2007 and the Microsoft .NET framework technologies with website and management tools developed with ASP.NET. Additional customization provides rich video streaming, zoom, and 360-degree rotation. New tools make it easy for staff to add, promote, and cross-sell products on the site. The retailer is on track to meet its goal of increasing online revenue by 175 percent in three years.

- **Social media**—An international firm with online website, mobile site, international franchise sites, and their own reality TV show wanted to leverage social media to quickly capitalize on the “brand fame” generated by the television show and, longer term, to build loyalty through customer dialog. To accommodate the quick launch timeframe, EMC developers used rapid, iterative agile development techniques. They built a “social hub” on open source content management system (CMS) to take advantage of its easy-to-use, highly flexible page layouts. The social hub was delivered within three months, deployed in the Amazon cloud, and links personalized interactive tools with blogs, daily news, competitions, articles, galleries, videos, Facebook, Twitter, and much more.

Whether a program is executed completely in-house or leverages the expertise of outside agencies, companies must make sure that strong end-to-end program management is in place. Indeed, the hiring of outside contractors without effective planning and strong oversight can increase the risk of start/stop efforts, gaps and misalignments, and wasted time and money.

Experienced program and project management, whether provided internally or by a trusted partner, is critical to providing end-to-end accountability and workstream coordination necessary for success.

**SUMMARY**

For companies to be successful implementing a differentiating customer experience initiative, it must be able to bridge the gap between the development of a customer experience strategy and its execution. A customer experience program management office provides a single point of control to drive the consensus, operational alignment, executive sponsorship, and cross-functional commitments critical to success. Where game-changing solution development is required, experienced designers (skilled in both interaction and user-experience design), developers, and project managers can help ensure that requirements are well-defined, the right methodologies are being used, and sufficient qualified resources are identified and committed to deliver enabling, user-centric solutions that meet program goals on time and within budget. Finally, organizations must realistically assess whether the management expertise and resources needed to execute the customer experience strategy they intend are available internally. If external help is needed, companies must carefully consider and clearly determine the role(s) and supervision of external service providers in their programs.

**WHY EMC CONSULTING?**

EMC Consulting has an extensive track record of helping companies across communications, media, and entertainment and other industries achieve their customer experience objectives.

We can help you plan, design, implement, test, improve, and manage an effective customer experience program that differentiates your company and meets your business objectives.

We offer proven expertise, methodologies, technologies, and tools for managing customer experience programs. We can help you quickly turn data into insight that informs, integrates, and accelerates your customer experience strategy to realize measurable results faster.

Our teams of seasoned experts bring you practical, multidisciplinary experience that spans industry, business, operations, technology, enterprise information management, and business intelligence.

We work with you to help you understand and make the most of what you already have—and develop a clear business case for moving ahead with the right investments to set and meet customer and stakeholder expectations, quickly.

Your EMC Consulting program manager and team can work with you from end to end—from initial strategy, through solution development and operational alignment, to the implementation of metrics and tools to monitor, measure, and nurture improvement over time. Or you can turn to EMC for help with any specific phase or aspect of your customer experience program.

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