

The 2017 Customer Experience Outlook

A Collection of Ideas
for the Year Ahead

Brought to you by
Kerry Bodine & Co. and Doberman

Happy 2017!

In the two years since we collaborated on The 2015 CX Outlook, much has changed in the world of customer experience, and much of that change has been digital. Speech interfaces, artificial intelligence, wearables, and robots have gained significant traction over the past two years and seem poised to take over our customer interactions.

And yet, when we reached out to some of our favorite customer experience authors, designers, and industry leaders to find out what they were thinking about at the beginning of 2017, the theme of digital innovation took a back seat.

Instead, they focused on our need to connect with each other: To build bridges across our organizations. To communicate honestly. To be kind to one another.

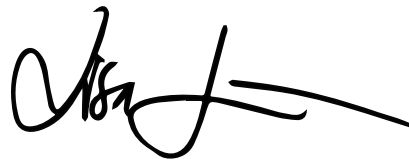
We believe this year's focus on the human aspects of customer experience reflects how 2017's political and social forces are shaping the way we do business. Certainly, it is a time for us to reflect on the work we're doing and the world we're creating.

We hope you'll find the ideas in this eBook both useful and inspiring for the year ahead.



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Kerry Bodine

Section 1: Talking With Customers

Humanity in the Digital Age



Ingrid Lindberg

Customer Experience Officer,
Chief Customer

I'm standing in line watching people walk in and out of Starbucks, picking up their coffee with zero interaction with humans, and I feel like I'm witnessing the death of interaction due to automation.

As someone who's lucky enough to travel the world for work, I know I can always count on Starbucks. And I know that sometimes they will misspell my name. But as crazy as it may seem, the misspelling of my name is part of what endears Starbucks to me. It is a huge part of the customer experience I've grown to expect—and even look forward to.

I've been using pictures of my misspelled name on coffee cups in my speeches for years: *Ing. Ingared. Inga. Frequent Flyer Rockstar*. (I have a few friends at the Starbucks in my local airport.)

The humanity of the misspelling is not just compelling for me. If you look at Starbucks Name Fail on Tumblr, you realize that it's endearing to others as well. There are even conspiracy theorists that think that the baristas do it on purpose. Why? Because the humanity of their customer experience is great for their brand. People talk about Starbucks in a way that is beyond the coffee consumption moment. People share photos of their cups like they are love letters.

Recently, Starbucks added new functionality to its app that allows a customer to place their order. And when they do, their name automatically gets printed on the computer-generated receipt, which is pasted to the side of the cup that's waiting for them on the end of the bar. No human interaction required. This brings great efficiency to the

coffee ordering experience, but it makes me less attached to the company. My connection, after all, wasn't really to the product, but to the person who wrote my name on that cup. I get it—you gain amazing efficiency by moving transactions online. You're meeting people where they are! But do you know what you aren't doing? You aren't making a connection to the human. And the thing is, humans connect to other humans. They don't connect to the efficiency of a web transaction. They may enjoy it, they may return to it, but they don't connect with it.

“Guess who brings brand values to life? Humans.”

We know that brand loyalty is driven by shared values. We know that people not only search out brands with values they themselves hold, but that they also stay more loyal to those brands—and refer them to friends and family. Guess who brings those brand values to life? Humans.

Whether it's the [Southwest Airlines flight attendant](#) who sat with a scared child during turbulence, or the [Publix grocery store baker](#) who gifted a child's birthday cake to a mom who was going through a tough time—those are the stories that spread like wildfire. Those are the customer experiences people remember.

As we embark on yet another fast paced, digitally driven year, I'd advise you to look at the giants who truly brought digital to the forefront of our worlds: Apple, Microsoft, and Amazon. Apple's insane success with the Apple Store is worth studying. Why did they open retail stores? Microsoft then copycatted Apple. Why? And, as announced in 2016, Amazon is making a greater push towards opening physical stores.

Amazon's move is the most interesting to me, and I have heard others speculate that it's an effort to reduce shipping costs. But I'd argue that CEO Jeff Bezos has figured out that the need for human connection to his brand will be even more important in 2017 than it has been in the past.

As you design for digital interactions, don't forget to find ways to be human. A few ideas:

1. Use jargon free language. Have a voice that sounds like a person, not a machine. Using plain language not only increases understandability, but also [improves customer satisfaction and loyalty](#). Josh Bernoff also talks about this on [page 11](#).

2. Use real pictures of your employees. This can have an amazing impact on connection to the brand. For example, when I was working with a large pharmacy benefit company, we introduced our pharmacists to our customers via mailers with photos of the actual pharmacists and signed letters. We saw a double digit increase in trust scores in the first 6 months - just by giving the pharmacists a face.

3. Provide easy access to humans via chat, phone or video. That connection is priceless.

Amazing customer experiences and brand stories aren't driven by apps. They aren't driven by websites. They are driven by people. I love my Starbucks app for tracking my points and paying for my coffee, but in 2017, I'll still be standing in line so that I can experience being called "Angrid."

...

Ingrid Lindberg is a serial Customer Experience Officer (CXO). As one of the first CXOs, she has been on the leading edge of customer experience for 20 years. Her experiences have spanned the Fortune 500 across Finance, Healthcare, Packaged Goods and Retail, working with companies to create differentiating customer experience strategies and cultures.

She's a global keynote speaker, an author and through her company, [Chief Customer](#), acts as a guide to organizations as they drive their customer experience strategies and culture changes.

Follow Ingrid at [@iclinberg](#).

Smarter Service Starts with a Conversation



Keith Pearce

Vice President,
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The first customer service channel was innately conversational. In 1967, AT&T scientist Roy Weber invented the toll free 1-800 number. The concept was simple: when customers had an issue with a product or service, they shouldn't have to pay to call a company to get it solved—they just needed to have a conversation. But as anyone who has ever called a 1-800 number knows, it's rarely convenient for customers—they too often get the run around and can't do anything else while on the call.

Twenty years later, the next major advancement in customer service channels came in the form of "You've got mail." Email added such convenience that we were willing to trade off some of the clarity and immediacy that comes with real-time dialogue. After email, we transitioned to social media. Customers could broadcast their problems to the world via Facebook and Twitter and those with stronger voices could move up the queue. All service leaders remember Dave Carroll's infamous [United Breaks Guitars](#) video from 2009, which showed the world the power everyday consumers have on social media. (Read what Dave's learned about customer service since then on [page 18](#).) Social media amplified certain voices, but it was still a far cry from a real-time conversation—instead, it became a place to vent. Now, a new channel—messaging—offers convenience, speed, and conversation without

some of the drawbacks of the channels that came before. The traction of messaging is staggering. There are 80 billion messages sent every day via SMS, Facebook Messenger, and WhatsApp alone! That doesn't even include hundreds of other messaging apps like WeChat, Viber, Line, or Allo.

“You can't have the conversation if you're not on the channels your customers use”

People love messaging because it's instant and so innately conversational. Guess what? Customers

want to have simple conversations with companies that solve their problems. Here are four best practices to help your organization realize the promise of conversational service in 2017 and beyond:

1. Meet Customers Where They Are.

You can't have the conversation if you're not on the channels your customers use. So engage customers in their channel of choice. SMS is just the beginning, and companies need to present in every communication and messaging channel to create personal experiences that customers will love.

2. Empower Agent Conversations.

A human-to-human conversation is only as good as the agent on the other end. Think about the immediate response you expect when you send someone a text. Now think about the fact that 85% of customers have been put on hold while an agent searched for information that should have been at their fingertips. Agents need access to productivity tools and customer information faster than ever if they are going to deliver their end of the bargain on conversational service—which is to handle multiple omnichannel interactions in a faster, more personalized way.

3. Connect Service Conversations Across Channels.

When does my package arrive? Did I buy extended coverage? Does my usage qualify me for an upgrade? The conversations that follow these questions don't take place solely in the call center—customers need to talk with field service technicians, sales, marketing, and increasingly with connected products—and the answers transcend the knowledge base of any one channel. That's why

service teams need to be fully integrated with the rest of the business and must have a complete view of the customer to drive meaningful conversations.

4. Implement an Intelligent Conversational Platform.

Every two days, as much information is created as was created from the dawn of civilization up until 2003. We've reached a point where people can no longer process and do useful things with the amount of data we have about customers. In response, service interactions will increasingly become agentless. Whether it's notifications for a maintenance issue on a thermostat or predictive answers in a self-service community or IVR menu, customers expect that companies will use the wealth of information they have to answer their questions faster. Artificial intelligence will help service organizations close the gap and scale service with the needs of customers.

We all have conversations with our friends and family. Why can't we have conversations with the companies we do business with? That's the promise of conversational service, the new frontier for customer service.

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With nearly twenty years of experience in high tech, Keith Pearce has worked extensively in new and emerging customer experience markets in North America, Europe, and the Middle East. In his current role as Vice President of Product Marketing for Service Cloud at Salesforce, he is responsible for building awareness for the company's market-leading service offer, which is disrupting the traditional contact center industry.

Follow Keith at [@pistolprce](https://twitter.com/pistolprce).

How Your Writing Culture Determines Your Customer Experience



Josh Bernoff

Author of
Writing Without Bullshit

Words determine how people perceive your organization. If your products say “we love you,” but your words say “screw you,” you’ve undermined your customer experience.

Which words? Web pages. Invoices. Instructions. Emails. Read what you send to customers. Is it long, muddy, and passive, or pointed, direct and clear?

In 2017, this problem will become critical. Inboxes are getting crowded; Radicati Group [predicts](#) that this year, the average person will send or receive 225 emails per day. We’re also reading everything on tiny little screens: a [Salesforce study](#) estimates that people spend an average of 3.3 hours per day looking at their smartphones. When people are reading on a piece of glass, their concentration suffers. This year, acknowledge these shifts and change how your organization writes.

Ask these four questions about your writing culture. Use the answers to make it better.

Are you brief and direct, or long and discursive?

When I signed my one-person company up for health insurance, Blue Cross Blue Shield of Massachusetts mailed me 200 pages of impenetrable verbiage in eight separate documents. The message was clear: they didn’t care if I understood what I bought.

In [my survey of 547 business writers](#), 81% agreed that poorly written material wasted a lot of their time.

A culture of brevity fixes this problem. Give your readers a break. In a typical document, only half the sentences carry meaning. Delete the rest.

To serve on-screen readers, make sure that the title and first two sentences of every communication carry the payload. That way if customers give up on reading, at least they got the main message.

“Active voice writing makes responsibilities clear. Your customers deserve it.”

Do you write in the active voice?

Companies that screw up use passive voice to evade responsibility. For example, when Lexus navigation systems started crashing in summer of 2016, here’s what it told customers (I’ve bolded the passive verbs).

Errant data broadcast by our traffic and weather data service provider **was not handled as expected** by the microcomputer in the vehicle navigation head unit . . . The data **suspected to be** the source of the error **was corrected** Tuesday, June 7th.

You can almost hear some executive saying, “Hey, it wasn’t my fault.”

An honest, active-voice answer would start with “We broadcast some data that may have crashed the navigation systems in your car. We’re sorry. We’ve fixed the problem; if your system is still malfunctioning, here’s how to reset it.”

Active voice writing makes responsibilities clear. Your customers deserve it.

Do you insult your customers with jargon?

When the century-old company Tribune Publishing rebranded itself in June of 2016, it began [its press release](#) with this:

Tribune Publishing Co. today announced that the Company will change its name to tronc, Inc., a content curation and monetization company focused on creating and distributing premium, verified content across all channels.

Do you know what a “content curation and monetization company” is? It’s a *media company*. “Premium, verified content” is *journalism*. “Across all channels” means *in print and online*. This absurd jargon didn’t fix the problems in the news business, but it led to widespread ridicule, including [a segment](#) on John Oliver’s “Last Week Tonight” comedy news show.

Rewrite your communications in plain English. Not only will you help your customers to understand, but you’ll clarify for yourself what you’re actually doing.

Do your writing processes improve your writing, or make it worse?

I hear it all the time: “It was good when I wrote it, but after I incorporated all the edits it got confused.” If you blindly incorporate ten people’s suggestions, the result will be poor.

In my survey, only 32% of business writers [said](#) their

process for collecting and managing reviews was effective.

In an effective writing culture, writers build in time for draft reviews, which all take place in parallel on the same deadline. They use these reviews to identify flaws to fix, rather than just cramming everybody’s suggestions into the document.

Changing your culture to one that respects brevity, directness, clarity, and effective writing processes takes time. But you can’t fix your customer experience without it. Change the way you write. You’ll be surprised how effective that is at changing how people perceive your company.

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Josh Bernoff is the author of [Writing Without Bullshit: Boost Your Career by Saying What You Mean](#), which The Globe And Mail called “a Strunk and White for the modern knowledge worker.” His daily blog posts on writing and corporate life at [withoutbullshit.com](#) have attracted 1.5 million views.

Josh is the coauthor of three business strategy books including the social media bestseller [Groundswell](#). He was formerly an analyst and SVP at Forrester Research.

Follow Josh at [@jberoff](#).

Section 2: Be Nice!

Cultivating Civility



Megan Burns

Customer Experience Expert

California resident Amanda Blanc never thought Etsy would make her famous. But shortly after adding [a yard sign that reads “Make America Kind Again”](#) to her shop, TV cameras showed up on her doorstep. Blanc told CNN that the sign was not a statement for or against any political candidate. Her goal was simply to “spread awareness of respecting other people’s views and values.” Orders started pouring in by the hundreds because, as it turns out, many others want the same thing.

Sixty-seven percent of Americans surveyed for the 2016 report [Civility In America](#) think civility, or a lack thereof, is a problem in today’s culture. Almost three quarters said the problem has gotten worse in recent years. And not just in politics or social media. [Research by Christine Porath](#), an associate professor at Georgetown University, found that 62% of people are treated rudely at work at least once a month, up from 49% in 1998. And [more than a quarter of workers](#) have been victims of incivility so severe it meets the criteria for workplace bullying.

These numbers are distressing, particularly for the CX community.

We’ve worked for more than a decade to improve levels of empathy and cooperation in corporate culture. Every act of incivility between co-workers chips away at that progress. According to Dr. Porath, “when employees are exposed to rudeness, they’re three times less likely to help others and

their willingness to share drops by more than half.” And incivility spreads like a plague. [Research from the University of Florida](#) shows that just witnessing bad behavior, even if we’re not the target, makes us more likely to be hostile, aggressive, or rude to someone else.

Civility needs to be a CX priority. In particular, we need to combat the epidemic of insidious incivility—tiny acts of disrespect like chronic lateness, multitasking during meetings, and leaving a mess in the office kitchen. Some people rationalize these behaviors as a fact of modern life. That’s a cop-out. We can do better, and we must. If not, we run the risk that working relationships will erode to the point where CX ecosystems begin to fall apart.

The easiest way to improve civility is to lead by example. As you finalize your goals for 2017, consider a few simple (though not always easy) changes to your everyday habits.

“Witnessing bad behavior, even if we’re not the target, makes us more likely to be hostile, aggressive, or rude to someone else.”

Drive carefully. As I left work one day, a car came flying through the employee parking garage and almost hit me. The driver wasn’t someone I knew, and he didn’t stop. A few days later we ended up in a face-to-face meeting together where he showed no signs of remorse for our earlier encounter. Maybe he didn’t remember. But I did, and it forever tainted my perception of him as a colleague and as a person.

Eat lunch together.

Fifty percent of Americans [eat lunch alone every day](#). Dining with others helps you get to know them as human beings, not just job titles. And the better we know someone, the more slack we cut them if they are rude to us on occasion. We know they’re not a jerk, so rather than attribute the behavior to a character flaw we consider the possibility he was just distracted, overscheduled, or overtired.

Pay attention in meetings.

Executives at Salesforce [reportedly](#) leave their phones in a basket, out of reach, to reduce the risk of distraction during important meetings. If you need to take notes on a laptop, sit next to someone you wouldn’t want to catch you checking email. And

if you zone out in meetings that aren’t relevant to you, stop going. It’s less impolite to decline than it is to sit there without ever looking up from your screen.

Stop the stupid talk.

Sadly, it’s common to joke about “dumb” decisions made by executives or question the intelligence of people we disagree with. Rather than insult colleagues, try to empathize and see the situation from their perspective. Did they have less (or different) information than you do now? Were they optimizing for valid concerns like risk or stability but—in your opinion—got the balance between those things and CX wrong?

This stuff may seem trivial, but it’s not. When these little behaviors get repeated thousands of times by hundreds of employees every day it creates an undercurrent of negativity that customers can’t help but pick up on. That’s why I strongly suggest making civility a core pillar of your culture change effort (it it’s not already). But regardless, in 2017 we should all follow Ghandi’s (slightly modified) advice and be the kindness we wish to see in the world.

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Megan is a world-renowned expert in customer experience and human behavior. She’s helped Fortune 500 brands re-humanize customer and employee experiences for more than two decades. Megan was an analyst at Forrester Research for more than 10 years and been quoted in The Wall Street Journal and CMO Magazine. Before Forrester, Megan helped AT&T create compelling digital experiences. She holds a BS in Computer Science from Rensselaer Polytechnic Institute and a Master of Software Engineering from Carnegie Mellon University.

Follow Megan at [@MeganBurnsCX](#).

Compassionate Design



Dave Carroll

Musician, Speaker, & Author

2017 has the potential to put transformative tools in the hands of the customer experience industry. Recent advancements in data collection and algorithms are helping identify and analyze consumer sentiment.

Advances in “guided selling” are better equipping businesses to combine human and automated interaction in triaging the customer experience, from selling to service. These tools enable companies to interact more efficiently with customers, provide a more customized experience, and reduce the number of odd-shaped customer complaints that fall through the cracks.

As they adapt to these tools and new means of interaction, every business has a resource at their disposal that can positively transform the bottom line and make fierce brand ambassadors out of not only customers, but suppliers and employees as well. It’s free and extremely contagious.

I’m talking about compassion, defined as “the deep awareness of the suffering of another and the willingness to relieve it.” Often dismissed as “touchy feely” or considered out of place in a competitive market, compassion is usually an afterthought to business leaders who default to the war room mentality of beating the competition at all costs.

But I disagree. In the last six years I’ve traveled to 26 countries sharing my story about my experience with United Airlines and my resulting music video, [United Breaks Guitars](#). I’ve seen that businesses that prioritize the reduction of suffering associated with their products or services have a competitive

advantage over ones that focus solely on reducing costs and increasing shareholder value.

“I’ve seen that businesses that prioritize the reduction of suffering associated with their products or services have a competitive advantage”

More companies are making the choice to apply *compassion* in their business at the DNA level—at the core of everything they do. I call this *Compassionate Design*. Compassionate Design advocates making “caring” a core value of your organization so that, like DNA, it self-replicates easily and effortlessly. An organization founded upon Compassionate Design cares about its suppliers, employees, shareholders, and customers

simultaneously—it understands the connections we all share.

For example, Royal Caribbean Cruise Lines has a program called “Own it Royally” which empowers and encourages the thousands of crewmembers on their ships to identify and solve problems where they find them. Fostering a culture of “caring on purpose” has helped the cruise line eliminate complaints before they become problems—and turn momentarily frustrated passengers into committed brand ambassadors.

Compassionate Design means that employees feel empowered, churn is reduced, and the quality of products and services increases. Free advertising from positive word-of-mouth travels effortlessly. Because your company is always looking for pain points and how to alleviate them, product innovations are crowd-sourced and continuous—leaving you less susceptible to competitors with a fresh approach to better serving your customers

The solution to being a successful brand in 2017 and beyond depends on leveraging our connectedness by being relevant, producing quality products or services that improve the world, and caring for all stakeholders simultaneously. This kind of branding can’t simply be fabricated with a creative PR campaign. You have to “be” the company you say you are.

Having this type of congruence enables you to be transparent to outsiders, without aspects of your operation contradicting the conversations you want them to have about you. For example, if you sell clothing and promote great value and the use of eco-friendly materials, it would be incongruent if people were to discover that you use unfair or disempowering labor practices to manufacture the goods. Gaping holes in the continuity of your story

amount to serious vulnerabilities for your brand. Instead, Compassionate Design can help ensure a congruent story.

The new and developing technologies that support compassionate cultures are disruptive to the war room mentality and will allow enterprises of all sizes to be more caring—and to thrive. When we begin by seeing ourselves in everyone else, we ask better questions. When we are congruent in all of these areas, we are truly poised to build a captivating story at a time when great stories will continue to spread like wildfire.

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Dave Carroll is an award winning songwriter & social innovator from Halifax, Canada who is recognized as a master storyteller. He became familiar to 150 million people globally when his 2009 YouTube music video about a customer service issue, “United Breaks Guitars”, became a worldwide media sensation. He is a highly sought after professional speaker & published author whose message demonstrates that we are fundamentally connected, that simple changes in perspective can inject caring into your business & that organizations founded upon “Compassionate Design” makes for a happier, productive & successful environment.

Follow Dave at [@DaveCarroll](https://twitter.com/DaveCarroll).

Section 3: Building A CX Foundation

Forget About Chasing New Trends: Take a Top-Down, Bottoms-Up Approach



Matt Inman

Head of CX Consulting,
MaritzCX

As we enter 2017, CX has arrived in a big way—at press time, a LinkedIn search for “customer experience” brings up 1,316,271 results. As part of a fast-paced and competitive industry, it’s easy to chase shiny objects, try to emulate Zappos or Uber, or focus on what you are not already doing. But the reality is most of the shiny new CX objects are suited for only the few organizations that have mastered the foundational aspects of the discipline.

As organizations start a customer experience function, or try to solidify the place of CX in the company, the most important thing they can do is get the basics in place. This begins with building a culture based on a structured framework. Everyone agrees that focusing on the customer is the right thing to do, but they’re often not sure what the “right thing” is. The function of a CX leader is to define for everyone in the organization what the “right thing” is for each person.

Here are five foundational places to begin:

Don’t Do Anything Without Senior Sponsorship

It is difficult to gain momentum unless there is a senior leader in the organization who is willing to give time, resources, and actions to support CX. The customer experience leader needs to convey confidence and passion by defining what success will look like and showing the sponsor a well-structured plan to get there.

Gather Insights and Don’t Forget to Take Action

Most organizations establish a Voice of Customer (VoC) program and identify insights to act on. A VoC program is the cornerstone of any CX effort but it is not a CX program in and of itself. A VoC program done well is an enabler of a CX program. The actions taken to improve or innovate the customer experience should flow from insights derived from customer feedback.

Speak the Right Language: Business Success

While CX practitioners measure things like NPS® (Net Promoter ScoreSM), customer effort, and customer satisfaction, these are still soft measures. If CX wants to earn—and more importantly, retain—a spot at the leadership table, CX leaders need to translate CX success into business success. A CX program needs to be proven at the organizational level to gain credibility, and this means showing its connection to customer retention, new sales, and ultimately bottom line revenue.

“Everyone agrees that focusing on the customer is the right thing to do, but they’re often not sure what the ‘right thing’ is”

Make Everyone in Your Organization Accountable

The greatest challenge that a nascent CX program faces is getting traction within the organization. Creating organizational accountability is a two-step process. First, establish a formal CX governance framework so the key owners understand their role in delivering on CX goals. Senior management should have direct involvement in this governance structure. Second, assign resources to provide immediate follow-up with “at-risk” customers. This is the lowest hanging fruit for any VoC program, but can be missed if accountability for actions is not established.

Align Employees So They Drive Customer Culture

Deploy the basic elements that can align employees of an organization around a common CX effort: Tie rewards to CX performance, ensure everyone shares a common vision, and provide access to CX performance and insights so people can understand—and take action on—what the customer feels about their experiences.

Customer experience can be a differentiator for any organization. But in 2017, the discipline will

approach a critical juncture to prove it is more than just a soft measure and a “nice to have.” Executing a successful foundation will make CX an essential part of business decisions and financial success.

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Matt serves as the Head of CX Consulting with MaritzCX. He is responsible for helping companies develop customer experience improvement roadmaps by applying best practices from the industry-leading customer experience programs he has developed and managed for companies during his career. He also leads the development of thought leadership strategies for the company. In 2015 he was awarded the Customer Experience Professionals Association Impact Award—one of four CX Suppliers awarded globally that year.

Turning Love into Money in Difficult Times



Fernando Straminsky

Founder & CEO,
The X

Inspirational and thought-provoking articles about customer experience are everywhere. And this is good! But when we return to our organizations, what do we find? A huge gap between those inspiring materials and the day-to-day realities of the bottom-line. In 2017, our complex global economic context means that we must prepare for a strong focus on cost reduction and a rigorous analysis of each investment proposal.

Customer Experience programs require strong investments and profound changes in companies. But it's hard to find organizations using state-of-the-art analytical technology and solid financial fundamentals to build their Customer Experience business cases.

This year, passionately talking about love for our clients as a means to justify investments won't cut it. Solid analytics methodologies, supported by econometric and other statistical models, will be key to building robust business cases. When we can predict our proposed CX project's financial results we will succeed in converting that passion into positive impact in the bottom line.

Look for your best ally.

So what's to be done? When it comes to investing in CX improvement projects, one of our best allies should be one of the company's most pragmatic characters. It's critical to engage the CFO and his or her team to co-design ways to measure the impact of CX initiatives.

In my own experience, if we successfully stir the tears of this key executive by championing

customer experience improvements, our CFO will surely give us a brotherly embrace while whispering: "Great! But please first do me a favor: Show me the money!" But how?

"It's critical to engage the CFO to co-design ways to measure the impact of CX initiatives."

Use solid statistical tools and build your case.

Our brain is designed to analyze and interpret situations where one variable or driver fully explains the cause of any change. If I did well on a test, I assume it's because of the number of hours I studied. We automatically establish cause and effect relationships.

In many contexts, simplification can be useful. But customer experience isn't one of them. When we need to understand complex situations like the evolution of Net Promoter ScoreSM (NPS[®]), hundreds of variables can influence an outcome. We must work with statistical methodologies specifically designed to analyze multiple drivers simultaneously. Did I ace my test because of my studying or because the exam was easy? Or both? To show our CFO friend the CX money, we need to understand the explaining power of each driver in order to focus on what really matters.

Let's turn love into money!

When launching my first CX program, my top priority was to develop a model to predict the impact of each proposed initiative to improve NPS. If we solve a certain issue, or root cause, was our NPS going to improve? How many sales would result from the recommendations of our new Promoters? How much revenue would those Promoters drive because of upgrading or future cross-selling? How much could be saved when those customers needed less technical assistance and were less likely to ask for account termination?

The final result: a model named the "Predictive Machine" (PM), which received Gartner's "Global Excellence Award in Customer Experience" in 2014. The PM allowed us to prioritize the most important CX projects by computing an NPS evolution prediction for each one and converting it into the predicted economic impact to our company's bottom-line. In other words, we figured out the extra NPS points—the incremental "love" of our customers—that we would gain by implementing each initiative and the additional revenue that those points would represent.

To win the love and money of your CFO, you'll need a tool capable of linking and prioritizing multiple drivers to the target NPS results. The same applies to other customer advocacy measurements. This is the core of an NPS Predictive Model.

So now, you just have to play with "What if?" improvement project scenarios to obtain your predicted NPS score and revenue impact. The resulting business cases will be too powerful tool to ignore.

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Fernando Straminisky is a customer experience expert and the founder of [The X](#), an innovative CX firm that helps companies to design and go-live their CX programs, by transforming emotions into business impact, implementing analytics cutting-edge tools, and designing customer focused culture change programs.

He was awarded by Gartner the "Global CX Excellence Award" for the creation and successfully implementation of a pioneering CX vision and strategy in DIRECTV Latin America—an exciting journey from scratch to a renowned team of +300 professionals across 9 Latam countries.

Follow Fernando at [@fstramin](#).

Section 4: The Evolution of Design

Design-Led Change



Oliver King,
Co-Founder & Director,
Engine

At the end of the day, our jobs at Engine are about making the world a better place one service or experience at a time. We have to do this intentionally, which means we have to help organizations get things done. Working with billion dollar businesses, we've learned a lot about what it takes to do this. We've seen them try to outspend each other on marketing, ruthlessly pursue operational efficiency, and digitally transform themselves. But the same questions that have plagued organizations for decades remain in 2017: What do customers want, what will they pay for, and how do we get more of the right things to market faster?

Organizations are reaching the limits of what efficiency and technology alone can provide. They need to move away from a management approach that is solely technology-, marketing-, or resource-led to one that's customer inspired, vision-led, faster paced, more experimental, engaging, and exciting. Put simply, organizations need to move to a design-led approach to change.

This approach requires developing *designerly* competencies. Fortunately, customer experience practitioners are well placed to help organizations adopt these new skills and mindsets. Here's how:

#1

Straight at the top of the list is the need to develop a **Compelling Vision** so everybody and their

respective resources can be lined up in the right direction. Without a vision, silo wars break out and the business becomes introspective and inside out. Good luck getting anything to market with that!

#2

CX practitioners need to focus on what we at Engine call "**Beautiful Design.**" This isn't about aesthetics. In the corporate world something is beautiful when it costs less to create, market, and deliver. Make something "beautiful" in these terms and it'll get started sooner, get ahead quicker, and attract more funding.

#3

Then there's the need for a **Clear Case**, because nothing is going to happen until key stakeholders

are on board. The secret here is for businesses to challenge their traditional evaluation and sign-off sessions. Instead, take a much more collaborative and cross-functional approach. Make the case for softer forms of value too, such as brand perception, partner appeal, or colleague engagement.

“Engaging projects have gravity; they attract people, resources, and solutions towards them.”

#4

Next up is ensuring things are **Ready To Build**. According to Accenture, organizations waste up to 48% of R&D budgets because of poor customer insight and slow time to market. The first issue is obvious, but the second issue results because projects pass through so many people’s hands, and so the cutting edges of the proposition and its features become dull through misinterpretation, confusion, or sabotage. Organizations need to use design-led approaches that will create more informed and actionable blueprints and master plans, which in turn make things easier to build. Then organizations need to passionately prototype to mitigate risks.

#5

Fostering the **Right Conditions** is key. Great experiences come from great organizations and John Kotter’s “guiding coalitions”—small groups of engaged, respected and invested individuals—need to be established to shepherd projects through. Organizations need to spend enough time designing and scoping the design process itself, identifying dependencies, and negotiating ownership and governance of the new approach. Without doing this they will slowly revert to their former ways of working, with the obvious results.

#6

Engaging Projects motivate people—the more engaging and enjoyable they are, the more likely they are to succeed. Starting with the right people, the right process, and the right purpose makes work easier. Layering a design-led approach on this foundation results in enjoyment from the originality of the tasks, having fun, and learning new skills. Engaging projects have gravity; they attract people, resources, and solutions towards them. The thinking becomes more robust and confidence grows.

#7

The final competency is ensuring project outputs are **Well Realized**. The lesson here is simple: Well-designed working outputs—like project tools, assets, and communications—improve confidence, effectiveness, and speed. The more detailed, rigorous, and well-designed key outputs and deliverables are, the stronger the message that “quality is important in this project.” This translates straight through to production and delivery for the teams.

These seven competencies will feel familiar to customer experience professionals because they're rooted in human-centered design. In 2017, CX pros will work to learn and apply these competencies as they realize the need to go beyond traditional approaches to developing and delivering experiences. Organizations will not only need to complete well-orchestrated product development cycles, but also find ways en route to inspire businesses to invest, implement, sell, and support these experiences brilliantly. How should organizations get more of the right things to market faster? Through design-led change.

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As a co-founder and director of Engine, Oliver helps organizations identify where, when, and how they can provide better, more meaningful and valuable services. Oliver is a passionate advocate of co-creation, design thinking, and helping organizations help themselves through actively building internal service design capabilities. Oliver is a recognized pioneer in his field who regularly speaks and writes internationally on service design and innovation, and is also a board Director of the Design Business Association.

Follow Oliver at [@OllyKing](#).

The Value of Design in Business



Martin Dowson

Head of Design Forward,
Lloyds Banking Group

Every field, and every discipline within that field, has a cycle. The multi-disciplinary field of customer experience is in an evolving, multi-layered cycle spanning 15 years (and counting). Within the CX field, measurement and insight were the first disciplines to ascend—the hot topics of the early 2000s. Over the last decade, businesses went from standing up new CX measurement programs to merging those programs with continuous improvement disciplines and embedding them into the heart of business operations. Some organizations are behind or ahead of the curve, but the direction is clear.

A discipline that is newly proving itself valuable to the bottom line can herald a challenging time for expert practitioners. Suddenly there are not enough experts to go around; everyone wants to become one—quickly. Two types of new people arrive—those who have always been practicing your discipline but didn't have the right label for it, and those who think they've been doing something similar enough and now want to borrow your expert label (and limelight!). It can feel like your discipline is taking a step backwards, and it might be tempting to retrench into your expertise or spread yourself too thin.

Many disciplines go through a boom and bust phase—the demand forces rapid expansion, which comes at the cost of quality of output. As this

eventually undermines the discipline, the business moves on to the next thing that it believes will add value.

The discipline of experience design is going through such a cycle.

Over the past few years, we've come to a juncture where consumer expectations have risen but remain fluid. Products and services are colliding. CX graduated from measurement, insight, and continuous improvement towards understanding that the CX is the Business—and the Business is the CX.

In 2016 we realized that these complex systems need (re)designing. Designers are now required to apply themselves not just to the product but to the whole of the business. As a consequence, the demand for design to bring its sub-disciplines together

and support organizations' transformations to customer-led businesses has skyrocketed. Those who were traditionally the agents of change in a business (business architects, technical architects, change managers) find themselves side by side with industrial, service and business designers, attacking complex problems as a team. The boundaries between disciplines often seem fuzzy and confusing.

“2017 is the year to start to embed design skills throughout the organization, to see more people designing without needing to be designers.”

If you're a designer, you have a choice to make in 2017: You can fight for the exclusive cachet of remaining the expert, or you can go with the flow of the cycle. The way to avoid boom and bust phase for design is to embrace this phase—embrace the demand for people to take on this discipline. It is also the only way to scale up your impact as a designer.

Here's what we know:

- The fundamental principles of design apply across many sub-disciplines—especially those traditional agents of change.

- Our shared toolkit is useful to many problem sets and business disciplines.
- Our methods inherently foster multi-disciplinary collaboration (something CX practitioners have long advocated).

For those with deep expertise in design—whether in house or at an agency—your challenge is to translate your skills across the organization. Share your designer's mindset and toolkit with the existing disciplines that build and manage the business.

Mentor for the more common challenges and focus your deep expertise on the truly stretching projects. You will find that in teaching what is second nature to you whilst also taking on the complex challenges, you will actually deepen your mastery—and in turn be prepared to help us all through the next cycle.

For those of you in other disciplines—find a designer to bring into your team and learn from their experience. It will stretch your own talents in ways that will surprise you and greatly benefit your business and customers.

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Martin Dowson is Head of Design Forward in the Digital CX Team at Lloyds Banking Group. He is a visiting lecturer on Design in Business at Rutgers (USA) and Napier (UK) Universities, a certified CX Practitioner and holds a Masters in Psychology and HCI from Edinburgh University. Martin has applied his knowledge of Design to everything from the UK's first online grocery shopping to the organizational redesign of Virgin Media. He lives by the sea in Scotland.

Designing for Cultural Transformation



Tomas Edman

Manager of Experio Lab

Most of today's organizations were established based on an industrial mindset that supports the efficient production and delivery of goods. Yet service logic suggests that service, rather than goods, is the basis of exchange—and that all value is co-created. Service logic has arrived and it's here to stay. And with it, the pressure for organizations to make the shift from provider to co-creator is mounting.

This thinking represents a huge shift that customer experience practitioners—from the bottom to the top of organizations—will need to make in 2017. Now it is no longer only about delivering satisfactory experiences to consumers, it's about integrating the skills and knowledge of everyone involved. At the heart of this change is a cultural transformation—a fundamental alteration of our rituals and beliefs.

At Experio Lab, we are working collaboratively to shift the Swedish healthcare system toward recognizing patients and their families as partners and co-creators in service. However, the entrenched, hierarchical, expert-driven, and delivery-oriented culture within healthcare is one of our biggest obstacles.

By all accounts cultural transformation is difficult and messy, but not impossible. Design provides us not only the tools to improve experiences or develop innovations, but also a means of transforming culture. By engaging healthcare staff, patients, families, and other stakeholders

in participatory service design processes, we can spark changes in their underlying beliefs about how healthcare should work.

Through service design practices such as patient observations, role-play, and journey mapping, we have found that we can help people get a new perspective on an old situation. With this new perspective, they can start to understand and challenge some of the beliefs that are foundational to the traditional healthcare system, like “doctor knows best.” Then they can start to openly generate alternative rituals built on new beliefs and try out these alternatives through service prototyping.

For example, Experio's Patient Journey project engaged dozens of healthcare providers to understand what happens during a hospital visit from a patient's perspective. Staff took on the role of patients and mapped out patient journeys—they were even placed on stretchers to intimately experience what the patient journey feels (and smells) like throughout the hospital. Reflection

on their experiences triggered many staff to reconsider their regular habits and systems, rethink what patient-centered care really means, and alter their approach to interacting with patients. This process also sparked a number of other change projects and strategic work within the hospital.

“Design projects can act as a ‘Trojan horse’ in organizations, unassumingly helping to disrupt the inertia of the status quo.”

Over the course of our work, we’ve seen three key ingredients for this process of change:

Curiosity and empathy for people’s everyday lives.

Curiosity is essential for people to start asking why things exist the way they do and to begin seeing situations differently.

Courage to dream of a better future.

Courage is critical for challenging the existing system and developing creative alternatives.

Co-creation to make it happen.

Co-creation is the only way to learn from each other and build collective momentum for transformation.

These elements, leveraged within a design approach, spark change at an individual and

collective level. Design projects can act as a “Trojan horse” in organizations, unassumingly helping to disrupt the inertia of the status quo and nurturing cultural champions for a new era. As more and more organizations wake up to the fact that their current culture is getting in the way of integrating resources and supporting new kinds of value co-creation, design offers a hopeful approach for catalyzing transformation.

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Tomas Edman is the manager of Experio Lab, a design and transformation lab for patient-focused service innovation embedded in the County Council of Värmland, a public healthcare provider in Sweden. Experio Lab is a learning project whose mission is to create an environment where care and design can meet.

Follow Tomas at [@tomasedman](https://twitter.com/tomasedman).

Section 5: Organizational Transformation

The Industrial Designers' Guide to the Digital Galaxy



Stina Nilimaa Wickström

Vice President,
Volvo Product Design

Who could have guessed how important digital design would become? Certainly few of us who studied industrial design at the Umeå Institute of Design ID in the mid nineties, and certainly not myself. Who knew those newcomer nerds of the new interaction design masters program would eventually rule the design world?

I never pictured a discipline capable of disrupting literally every product category an industrial designer would deal with. I only saw a bunch of digital designers busy with selecting typefaces for displays or designing digits of machinery, not with creating new business models.

Twenty years ago, we totally underestimated how the customer needs we worked to address through product design could be completely disconnected from the physical product itself. For example, in my degree project from 1995 I suggested a digital Hasselblad camera connected to GPS positioning, along with a large detachable hand held screen wirelessly connected to the optics—but I failed to see the potential in connecting to anything beyond the physical product.

It took me nearly 10 years before I saw the full business potential. As a new Design Director at Volvo in 2006, I gained insights into what we could build. Within a few years, the CX team had outgrown the Industrial Design team in numbers—a sign of the size of the customer need we had identified. Initially we explored new ways of instructing, supporting, and facilitating the operators and drivers of our vehicles. Today, there are several layers of customer needs addressed—

how to plan the logistics of our customers' work, how to minimize environmental impact by efficient use of the vehicles, and how to provide smart and planned maintenance. The digital products are moving closer to the business itself and to the vehicle owners.

“2017 will increasingly challenge many traditional industries with the second wave of transformation.”

Today, heading the Volvo Group Product Design department, I can clearly see not only the size of business it has become, but also how it has changed our company's way of working.

CX has been far more successful in selling the design process beyond design practitioners than industrial design has been at this same task

over the last 50 years or so. The processes and principles are the same, but the glossary is new, and terms like use cases, personas, prototyping and agile teams have become the biz wiz words of the decade. Impressive, but unsurprising—the interest in digital approaches is propelled by pure business conditions.

Industries whose physical products are hard to replace with a digital service (like transportation) may have been fairly protected from the first wave of change. With the introduction of Napster in 1999, this first wave challenged the music, film, and media industries. 2017 will increasingly challenge many traditional industries with the second wave of transformation.

New behavior patterns will erode many companies' existing customer bases. As an example, growing online shopping will still need transportation to deliver goods, but the behavior and expectations of their customers—like the expectation for goods to arrive conveniently on one's door step—might change the overall transportation pattern, and determine which transport business model which will be profitable for the online store. The second wave is caused not by the disruptive service itself (like the online store) but by the customers' changing behavior due to new digital habits. It's generated by thousands of individual choices, rather than by large contracts. Will goods increasingly move directly from producer to customer? Who will own the warehouse in the future? Which business—which "link of the chain"—will potentially get skipped?

In the context of thousands of potentially changing parameters, the CX design method doesn't just offer tools to understand and analyze customer behavior. It offers the means to answer this behavior by prototyping business scenarios and potential innovation.

CX hasn't really changed the design process itself, but it has changed product development's approach to understanding the customer and answering the question: Who is the end user of our products and services? CX has paved the way for the entire design field to take a more classical user-centered approach, but not only with the user—CX involves the business owner, the customer's customer, and even the customer's customer's customer.

Beyond the technical connectivity we build between products and services today, we also need to build a new type of connectivity in our organizations. New definitions of who our customers are, as well as the character of the products and services we build, all challenge our traditional setup. People and departments who formerly had nothing to do with each other need to find ways of working together. As our organizations change, the new digital, agile way of working provides an important catalyst to find solutions, by quickly evaluating both the process and the results.

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Stina Nilimaa Wickström is a Swedish industrial designer with a master's degree from UID. She has broad industrial experience as designer, design manager, and marketing manager in multi-brand companies like home appliance giant Electrolux, forest and garden appliance company Husqvarna, and wallpaper group WallVision. She has worked for 13 years for various brands and business areas of Volvo AB, producer of global transport solutions and services, with leadership position since 2016. Stina is the chairperson of the Swedish National association of Design and a member of the board of Doberman Group.

The Leadership Leap



Lisa Lindström

CEO, Doberman

We've come a long way. Over the last decades, Customer Experience has matured in continuous leaps. In the first Recognition Leap we struggled to define the area and expertise. We gave it names and started to define an approach with tools and processes. And companies started to acknowledge it as a crucial asset. In the second Activation Leap we fought to have a seat at the grown-up table and argued that CX needed to be part of management boards and executive teams to truly activate it. Organizations installed CX officers, managers and teams. Clever capability training programs were carried out to enlighten the organization.

So, here we are. It's been a blast. CX is fired up and ready to go. But now what? Ahead of us, the majestic third leap is beginning to transpire and it has the potential to change things for real. It is the Leadership Leap.

The first and second leaps have nurtured a crucial understanding for customer focus and experience as a competitive driver. Yet in many organizations these leaps have only yielded incremental improvement of products and services—they may make products easier to understand and use or make services smarter. There's nothing wrong with that—if you're not in the race to win, that is. But companies that apply CX as tool for incremental

improvement will not meet the challenges of the experience economy. More importantly, they will miss out on the opportunity to deliver an experience as a horizontal and integrated part of the offering, rather than a series of isolated, delightful moments. These experiences materialize at the peak of emotional, functional, and economic value. They break through the noise and are profoundly memorable. They are the frontier.

Customer Experience-driven leadership is characterized by a new approach to metrics, non-linear and agile thinking in business development, a deep understanding of collaboration, and a true obsession with customer involvement.

To unlock this opportunity, companies just need to accomplish one tiny little detail: a complete rethink in business culture and operations. Oops. As with all major transformations, this cannot start in every corner of the organization simultaneously. It requires a change in leadership first. Executive teams cannot only have a CX representative at C-level.

“Customer Experience-driven leadership is characterized by a new approach to metrics, non-linear and agile thinking in business development, a deep understanding of collaboration, and a true obsession with customer involvement”

It is not enough to sponsor customer experience initiatives or to cheerlead outside of the rink. The leadership needs to fully embrace CX as a business philosophy and lead through example. This kind of Customer Experience-driven leadership is

characterized by a new approach to metrics, non-linear and agile thinking in business development, a deep understanding of collaboration, and a true obsession with customer involvement.

In my work, I’ve lately had the pleasure to witness—and be a part of—executive teams poised to take this leap. What unites them all is a perfect storm of new customer behavior, technology, regulations, and unexpectedly fast moving competitors. They all know they need to start transformation at the top before they can ask their organization do the same. This new breed of leadership infuses guts in to the organization. Here are some different gut-infusing approaches to get there:

The barrier-centric approach

The leadership team of a leading Nordic European bank worked hands on with real challenges and real customers to learn how to master a new innovation methodology that spanned from insight to ideation and prototyping. Executives then crafted a plan, rooted in true understanding and first hand experience, to lower critical organizational barriers that stood in the way of an experience-centric approach. The management team now owns and is executing upon the plan.

The bravery-centric approach

A major international telco carried out an unconventional “hackday” with their executive team, where they mixed work with the rational parts of their brains (by learning how to code) and the emotional parts (by learning how to sing!) together). The crescendo was a performance in front of their staff. By embracing the awkwardness, they proved how daring the organization needed to be to fully act on customers’ needs instead of task-driven organizational demands. They celebrated the unexpected.

The horizontal-centric approach

An iconic American arts and culture institution designed a lab for “the C-suite of the cultural world”—museum curators. Central to the new learning environment was the opportunity for curators to practice cross-departmental concept development. This is a cornerstone in CX Design—breaking silos and embracing horizontal opportunities broader than just isolated products and services. Prototypes from the lab were later integrated into institution workflows and products—but most importantly, the lab inspired ways to work across departments. When the curators change, the institution changes.

These are all small, but important clues to how leadership can change and how we can inspire that transformation. The long-term business effect of this is brewing in these companies. Change will take time and there are no short cuts. But one thing is for sure—this leap will be a big one.

I can’t wait to jump.

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Lisa Lindström is the CEO of the design firm Doberman, overseeing offices in Stockholm and New York. She has been appointed Sweden’s Service Innovator of the Year and listed as one of the top ten female leaders in Sweden. Lisa is the former chairman of the board of the Swedish Industrial Design Foundation, and the chairman of the board of the public service broadcasting company Utbildningsradion, UR.

Follow Lisa at [@lisalindstrm](https://www.instagram.com/lisalindstrm).

Design Your Organization as Thoughtfully as Your Products & Services



Peter Merholz

VP of Design,
Snagajob

In the six years since Forrester Research first wrote about customer journey maps in 2010, the drumbeat for such service design practices and deliverables has grown steadily louder. In 2017, the penetration of smartphones and cloud computing has turned every company not only into a service firm, but one where customers expect 24/7 engagement through their channels of choice.

Companies must be thoughtful and intentional in how they coordinate the delivery of their service offerings across multiple digital and analog touchpoints, or they risk confusing and losing their customers to companies that prioritize customer experience.

Most organizations have not yet fully come to terms with the implications of this shift, and still exhibit a product mindset while delivering services. They structure their teams around specific features and pay most attention to launching new functionality, but customer insights (drawn from research or analytics) don't feed into product development. Marketing focuses on communications and campaigns that are tenuously connected to the product, with more emphasis on building awareness and traffic. Customer service and support consist of overworked front-line employees who do not learn of changes to the service until they hear it from customers. These departments are siloed, connected only at the most senior levels.

At the heart of any service is the relationship

between the company and the customer. Understanding and delivering on that relationship distinguishes great services. This is why journey mapping has become so crucial—it illuminates the experience a customer is having and encourages insights for improvements.

“Marketing experiences and product experiences are all simply way stations along the customer’s journey.”

Journey mapping also suggests that design teams should be organized by customer journey. For

Peter Merholz

example, if you have a marketplace model with buyers and sellers, discard the old approach of embedding designers in product teams. Instead, have one design team dedicated to buyers and another to sellers.

This approach is gaining traction outside the design world. Ken Norton, a product management thought leader who advises the companies in Google Ventures' portfolio, wrote on his blog:

“Organize your product managers around customers, not code repositories. Connect product management (PM) areas of ownership to users and their product experiences. Maybe you have a buyer PM and a seller PM instead of back-end and front-end PMs. Or in a healthcare company, you'd have a PM responsible for the patient experience and another for the medical providers. When each PM has discrete ownership over an experience end-to-end, they can understand the customer problems more deeply and go all-in on representing their needs.”

This is a deep foundational shift in how companies organize their teams. It requires recognition that in a services world, the relationship with the customer is the most important thing. It makes “customer-centered” literal in structuring the org. For design teams, one of the clearest implications is that it no longer makes sense to separate marketing design and product/UX design. Marketing experiences and product experiences (and sales experiences, and support experiences) are all simply way stations along the customer's journey. They should be orchestrated and coordinated through one design organization, with teams structured by customers and their journeys.

Peter Merholz is a product management and design executive. Most notable for founding pioneering UX company Adaptive Path, Peter joined Snagajob at the beginning of 2017, after having led design at Groupon and Jawbone. He co-authored [Org Design for Design Orgs](#) (O'Reilly), the first book specifically about building and leading effective in-house design teams. He believes there is no such thing as UX design.

Follow Peter at [@peterme](#).

2017: The Year of The Journey



Kerry Bodine,
Co-Author of *Outside In*

Over the last decade, journey maps have transformed from obscure design artifacts to common customer experience tools. And they're not just for CX professionals anymore. When I recently met with a group of three dozen cross-industry customer service, operations, and technology professionals, most of their eyes lit up when I mentioned journey maps—and several couldn't wait to tell me about the maps they'd developed themselves. These conversations paralleled many others that I've had over the past year with clients hailing from marketing, process improvement, and quality assurance. In short, excitement for journey maps has reached fever pitch.

If so many people are already on board with journey mapping, why will 2017 will be the year of the journey? Because it's not about the maps.

Yes, [journey maps](#) are one of the most effective tools I've seen for understanding the end-to-end experience from the customer perspective. But the value of these maps is limited by the extent to which they're used. All too often, I've seen organizations create journey maps—then struggle to figure out what the heck to do with them.

The concept of the *journey itself* is the key to finally delivering on the promise of brand differentiation via customer experience. McKinsey & Company backs me up on this: In March 2016, it [reported](#) that

“journey performance is significantly more strongly linked to economic outcomes than are touchpoints alone.” To realize this business benefit, we need to start thinking less about journeys as things we map—and more about journeys as the organizing principle for how we do business.

I'm in full agreement with Peter Merholz, who says on [page 47](#) that we need to organize our people, our resources, and our work around journeys. One vital component of this reorg is the role of the *journey manager*.

Just like today's product management roles, journey management needs to be a full-time gig. (Be honest—if you're not willing to devote full-

time resources to this, you're not serious about improving your customer experience.) And just like product managers, journey managers will need to:

- **Have limited scope.** No journey manager should be responsible for every single journey associated with every single target customer group. Journey managers need to focus on a single journey—like onboarding or resolving a problem—so that they can truly understand it inside and out. If needed, they can manage that single journey for multiple personas.

“Why will 2017 be the year of the journey? Because it's not about the maps.”

- **Understand the gaps.** Journey managers need to conduct ethnographic research, facilitate current-state journey mapping exercises, and analyze a wide range of Voice of the Customer data to understand customers biggest pain points—and how those pain points stack up against those in competitors' customer experiences.

- **Create a long-term vision.** Through future-state journey mapping and experience design exercises, journey managers need to define the ideal state of the journey: How would it look and feel? What new touchpoints need to be developed to realize this vision? Which current touchpoints need to go away? How must existing interactions evolve?

- **Make the business case.** Journey managers shouldn't create pie-in-the-sky visions that will cost a fortune to implement without returning any business results. They need to prioritize the most important experience improvements and back up their recommendations with a solid business case to secure cross-departmental budget from their organizations' funding bodies.

- **Win the hearts and minds of cross-functional stakeholders.** Today's product managers play a vital role—but at the end of the day, they still work in individual business units. Journey managers will help us bridge our long entrenched silos by identifying, communicating with, and herding cross-functional colleagues who impact various parts of the journey.

I'm not big on predictions. But I believe that journey management roles will become a mainstay of customer experience teams in 2017. And once organizations adopt this new role, they'll see how the organizing principle of the journey can apply not only to improving (and innovating!) the customer experience, but to revolutionizing the employee and partner experience as well.

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Kerry Bodine is a [keynote speaker](#), [customer experience coach](#), and the co-author of [Outside In: The Power of Putting Customers at the Center of Your Business](#). Her ideas, analysis, and opinions have appeared on sites like The Wall Street Journal, Harvard Business Review, Fast Company, Forbes, USA Today, and Advertising Age. She holds a master's degree in human-computer interaction and has designed interfaces for websites, mobile apps, wearable devices, and robots.

Follow Kerry at [@kerrybodine](#).

KB & CO.

Kerry Bodine & Co. is a customer experience consultancy with a passion for human-centered design. Founded in 2014 by author and thought leader Kerry Bodine, we inspire business leaders and drive customer-centric business improvements.

We believe that remarkable customer experiences can't be outsourced. They must be built from within. And that requires new ways of working and thinking.

That's why we approach our engagements as coaches—not as traditional business consultants. Through hands-on workshops, we help our clients uncover deep customer insights and co-create solutions to their biggest customer challenges. Then we provide ongoing coaching and guidance as they develop new and lasting skills.

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DOBERMAN®

Doberman is an international Design Firm. We're here to change things. We partner with bold organizations around the world determined to deliver exceptional customer experiences.

Founded two decades ago, our teams in New York and Stockholm share the belief that great customer experiences transform businesses, define brands, and build relationships that truly matter.

We call them Frontier Experiences.

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