



*"I wish this framework had been around when I first embarked on our CE journey. It would have saved me a lot of time."*

*Jayne Hall, Former Customer Experience Director.*

*Vodafone*

# HOWTOEXPERIENCE



## Customer Experience Management

The **HOWTOEXPERIENCE** Benchmark Model

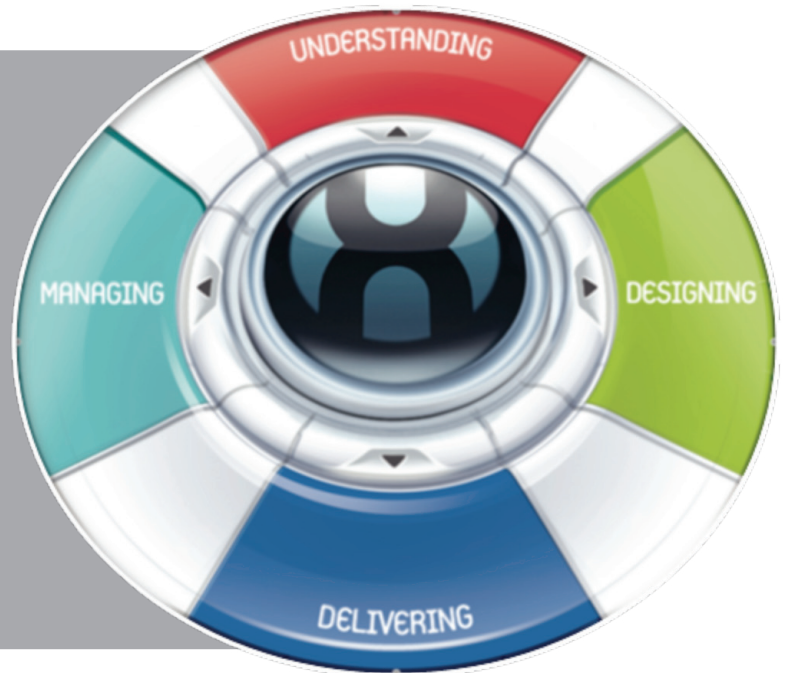


# The HOWTOEXPERIENCE Model

To develop and manage an exceptional customer experience, Smart Organisations make sure they understand what's happening - and why.

The HOWTOEXPERIENCE Benchmark Model spans 16 critical Customer Experience Management (CEM) disciplines.

Our model provides clear, unequivocal answers to understand, design, deliver and manage a winning customer experience.



## Understanding

**Customer Journeys:** Where can we improve experience and business results? How can we pinpoint the gaps?

Smart Organisations understand what's going wrong from a business and customer perspective across all touch points, throughout the customer lifecycle and through all customer journeys. Our model helps you walk the customer journey to collect this insight together. By bringing it to life, everyone can understand the gaps and challenges. Deeper analysis reveals the root cause of why the observed symptoms/gaps are apparent.

**Insight:** Do we have the right analysis and research? Can we turn it more reliably into insight?

Smart Organisations apply their research and database capabilities to create clear and unambiguous insight into customers and their usage, attitudes and behaviours. Our model helps to segment across a number of dimensions depending on the purpose. We support deeper insights about how people want to feel about us and the category and what broader opportunities there are around your products and services.

**Key Factors:** What do customers value most? How can we use it to drive their loyalty?

Smart Organisations understand what's most important to customers (critical to quality), the role each element plays in driving loyalty and engagement and how well they perform against these dimensions. Our model helps reveal this in the context of competition and other best in class providers. It's the starting point for understanding why customers change behaviour and how they go to market.

**Value:** What's the financial gain if we improve the experience? How should we prioritise the benefits?

Smart Organisations understand and clearly articulate the financial benefit of improving the customer experience. They determine which improvements will have the most impact and how much value will be derived from them through which customer groups. Our metrics help you prioritise these investments in the same way as all other business investments. We aim to provide a clear understanding of the four levers of customer value.



## Designing

**Strategy:** Is the business model defined clearly? Does everyone understand what we aim to achieve, and why?

Your CE strategy defines the type of experience you need to deliver to reinforce the business model and deliver competitive advantage in line with your business strategy. Smart Organisations define the

- Why (purpose and raison d'être)
- Who (priority customers and the associated strategy)
- How (behaviours and capabilities)
- What (products and differentiation strategy)
- Where (priority touchpoints)

of experience. Our model helps bring this information together clearly, so everyone can understand the strategy.

**Brand:** Have we defined our brand's purpose? Can we make this an 'ownable' brand experience?

Smart Organisations define what the brand's purpose is and how this drives an ownable brand experience. Our model checks you have a distinct and consistent look and feel, tone of voice and personality delivered through all touchpoints: that there's a clear brand story for all customers and employees.

**Design:** How we want customers to feel? What innovation is needed?

Having ascertained what type of experience is required, we need to innovate and design the experience throughout all our touchpoints, starting with the highest priority areas. Smart Organisations deliver functionally and emotionally. They define how we want customers to feel after every interaction and the way we do it. By looking at Brilliant Basics, Magic Moments, Clues and Signature Experiences, our model crystallises the role each person is playing and the capabilities required to support seamless delivery.

**Proposition:** Are we turning what customers want into compelling experiences? Are we communicating clearly?

Smart Organisations have a fast and reliable process for observing market and customer data. They can turn it into insight that drives new or refined propositions that resonate with customers. Our model looks at how easy it is for customers to understand your range and find what they need. When designing and delivering new propositions, it helps ensure the experience is protected and enhanced.

## Delivering

**Culture:** Is day to day operation aligned to experience strategy? Are people collaborating fully?

Smart Organisations ensure the "way things get done" is aligned to the business and experience strategy. This drives the demonstrable actions and behaviours of its leaders and people. Our model checks that collaborative working is the norm and that your enterprise process, environment and rituals reinforce your CE mission.

**People:** Do our people processes drive the right behaviours? Are we clear on the role we want our people to play?

Smart Organisations have people who understand the vision, believe it can be achieved, understand their role in achieving it and are equipped with the skills and tools to deliver it. Our benchmarking checks your end to end people processes (recruitment, induction, appraisal, development, reward and recognition) to ensure behaviour aligns across the organisation.

**Capabilities:** Is there a well defined operating model? Is operational data captured, analysed and reviewed?

Smart Organisations are set up to succeed with a well-defined operating model that is fit for purpose and guides capability improvement. We check that the key underpinning capabilities (data, technology, process) are in place to enable the experience to be delivered in house or through partners. We also look at your operation and management of resources, ensuring data is effectively reported and analysed to inform CE improvements.

**Improvement:** Are employees empowered to make improvements? Is change being achieved?

Smart Organisations harness their frontline people to understand what needs to be improved and how to do so. Our benchmarking looks at the ways both incremental changes and the wider CE strategy is driven forward. We also consider ways of implementing 90 day deliverables as part of an improvement plan.



*"HOWTOEXPERIENCE have conducted a number of consultative customer experience projects. They are people I will continue to refer to for insights and expertise."*

*Simon Chrisp, Vice President, American Express*



## Managing

**Strategic Alignment:** Are experience initiatives part of the business plan? Are they cascaded effectively?

Smart Organisations ensure experience initiatives are an integral part of the business plan and objectives. Our model ranks how well initiatives are cascaded down through your organisation into departmental and individual objectives.

**Measurement:** How do we measure what customers say vs. what they do? Do internal metrics reflect customer outcomes?

Internal metrics that reflect customer outcomes as well as efficiency help Smart Organisations understand how well they are delivering across the important touchpoints. Our investigation checks if regular satisfaction, advocacy and commitment measures are in place to understand how this performance is affecting customers. Root cause analysis helps us see what customers say vs. what they do and therefore the real effect. Real-time post interaction customer sampling can help to deliver daily specific feedback to staff.

**Management Process:** Are the right people meeting to review experience performance? In the right frequency?

Smart Organisations have a senior cross-functional team in place that meet regularly (at least monthly) to review experience performance and implementation progress against the plan across all touchpoints. Our model considers how you agree priorities, sign off plans, allocate resources, assess risks, address issues, make decisions and cascade actions to teams.

**Programme Management:** How are initiatives prioritised? Are we driving through changes effectively?

Smart Organisations use a fact-based prioritisation framework to ensure the right initiatives are selected first. Our model checks you have a clear roadmap that takes account of and is integrated with all other organisational programmes. It also reveals if benefits delivery is tracked to ensure efficacy of the process and programme.



# HOWTOEXPERIENCE

The difference is experience.

**HOWTOEXPERIENCE** believes there's nothing more powerful than an experience with a purpose.

We all remember them:  
the emotions they stir,  
the positive behaviours they  
drive and the results they bring.



**HOWTOEXPERIENCE** is a customer experience consulting business. We aspire to be the very best in the world. For the last 10 years we've worked with big blue-chips as well as innovative start-ups, delivering all aspects of customer experience improvement. Our consultants build value with clients and customers.

We're interested in changing an individual's experience of the world... and then changing thousands.  
We Move People.

## How we do it

- We connect: take time to understand your story; see the real need; add value
- Show the way: find possibilities: practical; clear on every step
- Give it MMFF: Meaningful, Memorable, Financial and Fun

## What we do

We drive business results by diagnosing, designing, and delivering better experiences across all channels. Specifically, we:

### Improve interactions

- Customer Journeys: mapping; designing & improving
- Benchmark Customer Experience
- Develop Customer Experience strategy and roadmap
- Build robust business cases

### Optimise customer contact return

- Rapidly analyse and identify opportunities to increase contact returns through the lifecycle
- Rapidly incubate these ideas in our contact innovation centre

### Transform organisations

- Develop Organisational Design and Performance Management systems & metrics
- Drive effective change
- Managing improvement with web-based Programme Management Tools
- Deliver bespoke leadership, CEM professional and frontline training programmes

**The difference is experience.  
Experience the difference.**

For more information and to arrange a meeting without obligation, call David Williams:  
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Email: [davidw@howtoexperience.com](mailto:davidw@howtoexperience.com)

“ Lots of well-meaning tosh is talked about customer experience, but David Williams is a genuine expert. If you really want to map and explore your customer experience and develop actionable plans to improve it - then work with **HOWTOEXPERIENCE**.

Many businesses have false impressions of their own customer experience that are as wrong and as long lasting as the Mythical Mountains of Kong.”

**Alex Batchelor**  
Chairman Marketing Society

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