



Leading a Customer Centric Business Analysis Practice

Lacey Barnfather

11th November 2016

Why Me?

- Freelance BA / CX Leader
- Worked for the last 15 years in Business Analysis, PMO and Customer Experience Leadership in the Telecommunications and Utility Industries.
- Educated at Cass Business School (BSc Mgt and Systems Science Hons)
- More recently - VP PMO, Process and CX at Colt and previously their Director of Business Analysis, Head of Group CX at BT and Headed up Business Design and CX at EE
- Lead and managed teams from 6 to 120 globally
- My Signature has been to transform 'Technical BAs to Customer and Business focused practices'

.....Always loved BA and CX its potential to
transform an organisation
- the two are connected

Today's session.....

Upping the ante on Business Analysis

Share a brief overview of some CX techniques and methods with a chance to put one into practice and identify how it would affect how your teams work today within your business.

1	CX Methods and Journey Map video example	10 mins
2	Group Exercise - Create a journey map by persona	20 mins
3	Short exercise play back	10 mins
4	BA and CX Connection example and CX Framework	10 mins
5	Group Discussion – How does/ would using CX techniques impact your BA practice and organisation, any key challenges?	20 mins
6	Short exercise play back	10 mins
7	Close	5 mins

Types of Journey Maps & their Business Value

There are many types of Journey Maps, and each have their purpose. Here are a few examples and the business value they bring. These types are not mutually exclusive, different elements of each can be combined into one map.

Emotional Journey



Visually illustrate your customer's emotions as they interact with your product or service. Focuses on the emotional satisfaction and triggers that drive customer loyalty and decision making.

Front State / Back Stage



Align the internal operational processes (back stage) with the customer's journey (front stage). Highlights internal processes that may be causing a disconnected or inconsistent customer experience.

Customer Lifecycle



The customer lifecycle follows the customer throughout the phases of their relationship with your company. It is high level and can follow the customer over many years. These can be useful for marketing and sales to target their efforts.



Retain & Attract Customers



Operational Efficiency



Save Money & Increase Revenue



Innovation & Differentiation



Lead the Competition

Channel Map



A channel map focuses on the interactions within and across channels, i.e. your website, call center, or physical store. Use these to help improve consistency and streamline operations across channels.

Service BluePrint



The Service Blueprint portrays the customer's journey with a service along with all the interactions that make that service possible. These can be current state, or future state to envision new or enhanced services.

Heat Map



A Heat Map uses color to quickly highlight and prioritize issues to invest in and fix. This map can be combined with other maps to provide the necessary background or justification to address the highlighted issues.



[Video – Customer Journey mapping Buying Coffee](#)

Source: Hany Mokhtar



AM I REALLY SICK?

WISH I WAS AT SCHOOL

I'M REALLY NERVOUS

THAT LOOKS SCARY!



MOM CAN'T HELP?

NO! NO! PLEASE NO!

GOES TO INITIAL DOCTOR

RIDES TO HOSPIT'L

CHECKS IN

WALKS TO MRI ROOM

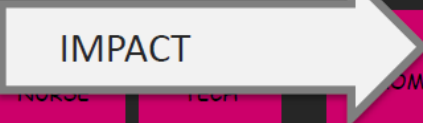
SEES MRI MACHINE

CRIES & RESISTS

SEES DOCTOR ENTER

GETS DRUGGED

GOES THROUGH MRI



DOCTOR

MOM

NURSE

TECH

MOM

NURSE

DOCTOR ANESTH.

IMAGING TECH

TAKE-HOME PACKET

CAR

DESK & COMPUT.

CHART

MRI MACHINE

TISSUES

NEEDLE & DRUGS

MRI MACHINE

TECH. WRITER

HOSPIT'L BLDG MGR

SYSTEM ADMIN.

DOUG

PATIENT SAFETY TEAM

IMAGING TECH

RESERV. SYSTEM

PATIENT RECORD SYSTEM

STAFF PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM



Great Experience

Break Out Session 1 – 20 mins

- Create a CX journey map for buying coffee from your *persona's perspective.
 - Identify 2 or 3 opportunities in your journey to delight or differentiate the experience for your customer?
 - Think about how would completing this exercise affect your team's BA processes / tools?
 - If it were done before you documented requirements
 - If it were done after
 - If it wasn't done at all

**Personas - They describe a group of people in a way that is easy to understand or emphasise with. You describe the person as a human being (Background, story, personality, interests etc.) and as a stakeholder in context of a service ecosystem (needs and expectations)*

BA and CX connection example

Large Telco 'Technical IT team of BAs and to relaunch them as business and customer focused – Let the ITAs be technical'.

Our First steps

- Understand the customer, be the customer
- Persona's, role play
- Invest in building your BAs understanding of CX. know what it is like to be a customer for us – now and in the future.
- Understand how the 'business' are building journey maps, what the vision is and what the measure for success are.

Our Next steps

- Journey maps prepared ahead of project feasibility, BAs assisting
- Impact to CX understood – Links of CX to requirements
- Can it be measured? Are these requirements understood, can you measure the changes?
- Create a 'virtual reality' of what we are asking for will be like for our customers?
- Mock ups, Prototypes wire frames, walk through
- Connected CX, Process, Requirements and IT Architecture teams and processes and systems
- Change Governance procedures – Customer Change Boards

Ever heard of the expression 'walking in someone else's shoes' ...?

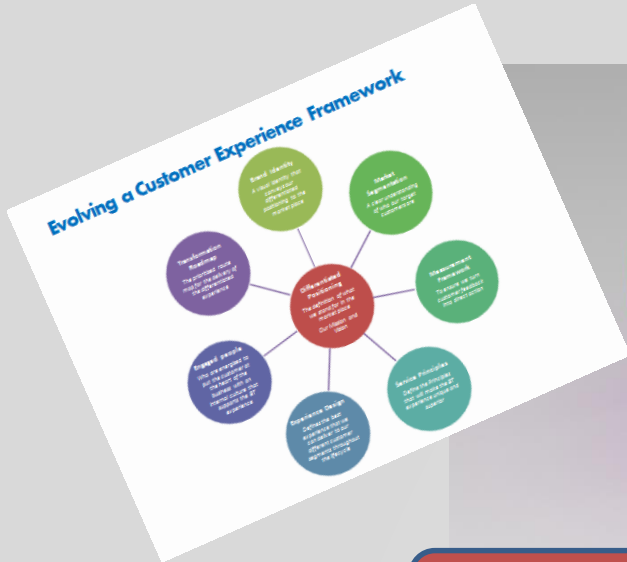
At the last Business Design Day the team were briefed on the latest customer personas and the new Customer Journey Blueprint templates as part of "Design it Right First Time" (DIRFT). To make the day a little more engaging 3 members of the team sneaked out mid presentation and returned to the room to the shock of everyone dressed up as our 3 of our customer personas! They truly did walk in our customer's shoes with Sophie dressed as 'Freda our pragmatist', Henry as 'Sari the chatty spender' and Matthew as 'Ian the maximiser'.

The idea is that we now design the customer journey before gathering the projects requirements, and that when we do this, we look at them from their perspectives and walk in their shoes. All 3 played their characters to perfection – well done!!

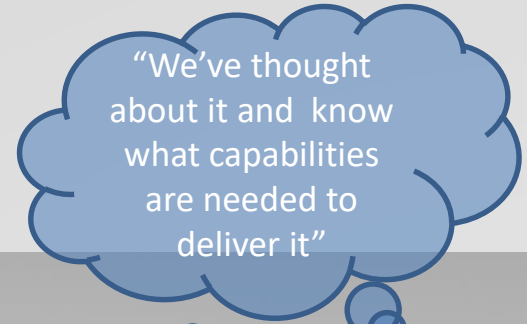
Watch out – you just might have one of 'our' customers turn up at your next customer journey walkthrough or you might even be asked to be one!



Evolving a Customer Experience Framework – not just about maps



“We now know what our desired customer experience is - and we LOVE it!!”



“We’ve thought about it and know what capabilities are needed to deliver it”



“And me!!”

“I know how I can help make it happen”

“Me too!!”

“I don’t 😞”



“Come on, we’ll show you”

Evolving a Customer Experience Framework



Where do you fit in this?

Customer Experience Management Framework

Organization-wide holistic Customer Experience Management

Framework Alignment

First-time and periodic activities to gain a holistic view of the Customer Experience and align the Customer Experience Management Framework.

Customer Experience Lifecycle Audit

Experience Lifecycle Audit

Audit of the Customer Experience Lifecycle that covers all channels, internal and external between customers and the company beyond the Customer Lifecycle.

Mapping

A map of the Customer Experience Lifecycle is established and various interactions prioritized in terms of business importance and impact on customer experience.

Customer Research

Multi-channel Insights

Different research methods are used to gain deeper insights into customer needs and what constitutes customer value at different channels.

Segments and Value

Customer segments are identified based on psychographics and particular attention is paid to understanding emotional value.

Organizational Alignment

Process Analysis

Analysis of internal processes to manage the customer experience, including cross-departmental information gathering and sharing.

Policy Alignment

Ensure processes, performance metrics, incentives and training are aligned with Customer Experience goals across departments.

The Customer Experience

The start, middle and endpoint of the Customer Experience Management Framework.

Experience Design

Designing the Interaction

Understanding of channels, customer value and company processes is used to:

- Design the Experience at individual channels
- Create seamless multi-channel interactions



Customer Experience

The experience is what happens when customers interact actively or passively with any channel.

Framework Implementation

Structured enterprise-wide systematic collection and management of customer insights and the processes to feed them back into shaping the experience.

Customer Insights Program

The Customer Insights Program, which integrates the Voice of the Customer (VOC) is a collaborative effort between different departments. It may be managed by a dedicated Chief Experience Officer.

KPIs

Customer Experience KPIs are used to measure experience improvements and set experience goals.

Immediate Action

Feedback is passed on to the relevant departments for immediate action. For example, PR may respond to complaints in social media, or reported issues with a product can be sent to development for immediate fix.

Ongoing Feedback

Feedback from different sources are shared across relevant department for action to be taken. This can include everything from call center enquiries to social media discussions.

Periodic Research

A mix of research methods can be used to understand the overall customer experience with the company and that at specific channels.

Business Decision Process

Insights are factored in at the core of business decisions. This can be in terms of:

- Branding and Marketing
- Sales or servicing processes
- Product or service enhancements
- New products or services

Feeds back into the Customer Experience

Customer Experience Roles

Customer Experience is every department's responsibility.

Marketing

Communicate the differentiated customer value and brand promise. Also monitor customer feedback and opinion in public channels and respond accordingly.

Human Resources

Communicates the Customer Experience brand values and goals internally and ensures staff have the appropriate skills and mindset to deliver the Customer Experience.

Operations

To facilitate the delivery of Customer Experience by enhancing internal processes and back-end functions and to deliver it directly at multiple servicing and support channels.

Sales

Ensures sales people have the appropriate skills to understand and deliver customer value at each phase of the sales cycle; from recommending solutions that meet customer needs to post-sales follow-up.

Research & Development

Understand customer value through customer research and the Customer Insights Program and integrate it at the core of the company's products or services.

Group Discussion – 20 mins

How does/ would using CX techniques impact your BA practice and organisation?

.....Any key challenges?

Feedback points by Table:

Table A: 3 main impacts to your practice

Table B: 3 skills BAs have to support CX

Table C: 3 key challenges your practice faces moving into the CX Space

Table D: 3 things you could go and apply today in your teams



Some prompt questions for your group discussion

- *Who owns the customer in your organisation? Could you put a RACI against it?*
- *Who owns the Customer vision and brand?*
- *When you get involved with a project / business change, has this work been completed already? Do you have a clear CX vision or blueprint you are designing to? Are you involved at all in the creation of this?*
- *Do you keep track of how the vision CX is being impacted throughout the project as requirements move and change if you don't does someone else?*
- *How do you test if the desired CX has been achieved?*
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- *What skills or knowledge gaps do you believe your team has to be integral to work on Customer experience?*
- *What happens if your team are not involved in this?*
- *How can you and your team take a lead in CX?*

Close.....

I'm hoping..... Today has given you a little insight on how to connect Business Analysis (BA) and Customer Experience (CX) techniques and how to take the first steps to ensure your BA practice is a cornerstone of the design and execution of a great CX for your business..

Useful resources / sources

- *Pinterest, YouTube (especially Oracle), Linkedin Groups (checkout my profile)*
- *Get talking to those in your business involved in CX already*
- *Connect with each other*
- *Great info / templates <http://designingcx.com/cx-journey-mapping-toolkit>*
- *Online crash course*
<http://static1.squarespace.com/static/55ba4533e4b0cde7d7dd93ae/561bcf02e4b0bc599a39521e/561bcf0be4b0bc599a3953db/1444663051867/Crash-Course-CX-Journey-Mapping-20120731.pdf?format=original>
- *Some inspiration – CoolCX Brands 2016 1to1Media*
<https://online.flippingbook.com/view/268786/1>

Handouts, worksheets and resources

- Print out of one pager Journey types
- Print out of blueprint example TBC
- Printout CX Lifecycle Framework example
- Print out of Coffee Journey screen shot
- Print out of exercise question
- Post it notes and pens for Petrol journey, flip charts
- Print out Personas

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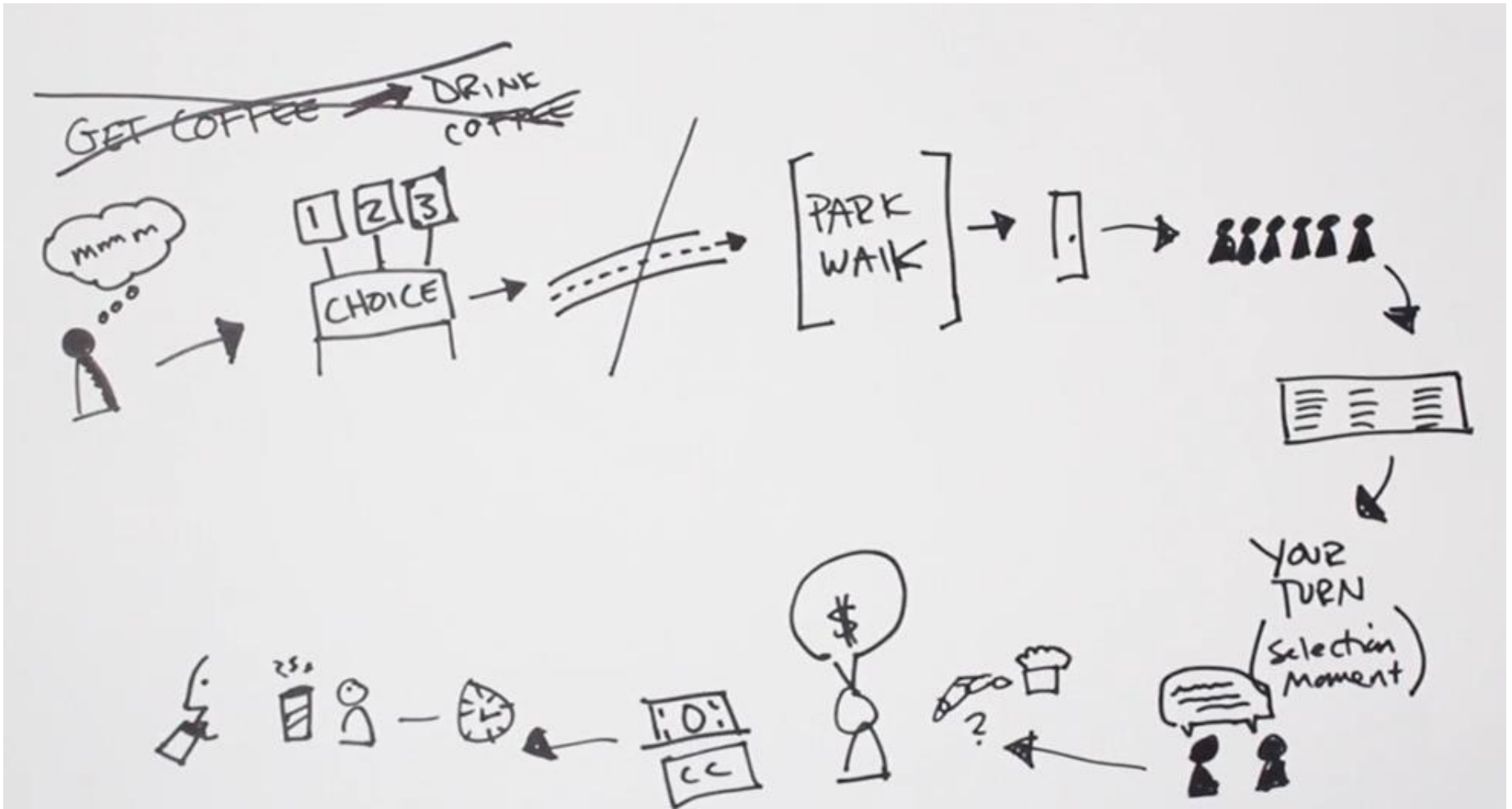
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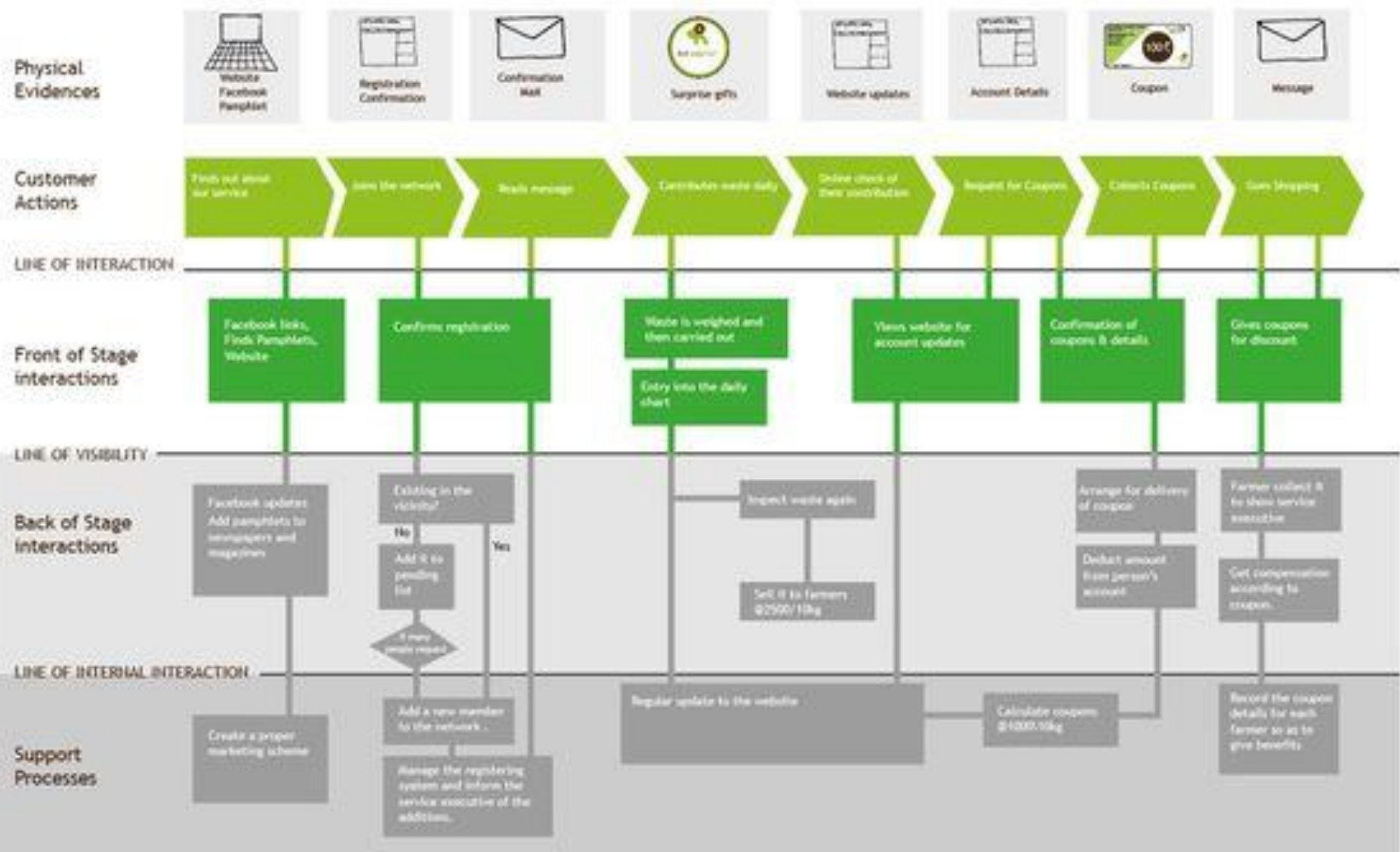
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Service Blueprint - Rehash.Org



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Break out Session 2

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Table B: 3 Skills BAs have to support CX work

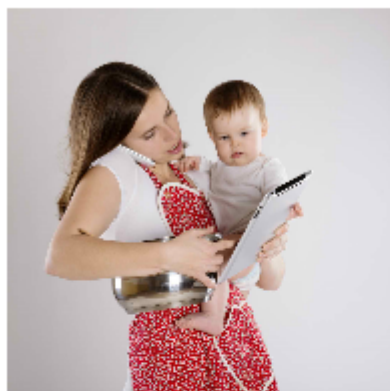
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Hannah Bradbury



"I love my kids, but I do treasure 5 mins peace"

Age: 34

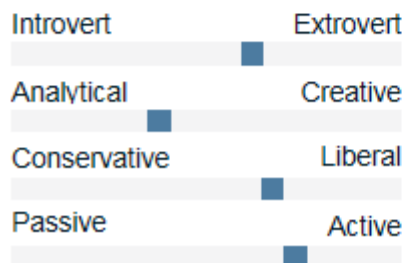
Work: Senior Business Analyst, 4 day week

Family: Married, 2 kids, age 6 and 1

Location: Hillingdon

Character: Busy

Personality



Too busy

Perfectionist

Very chatty

Goals

- Happy, healthy, well rested kids.
- To feel on top of things and get some 'me' time
- A happy family life and some social fun
- To perform well at work.

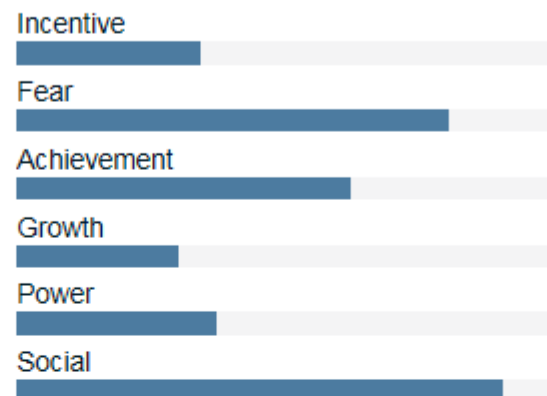
Frustrations

- Time wasting.
- Things that aren't as could as they should /could be.
- Waking the baby mid nap.
- Bad coffee.

Bio

It's Hannah's day 'off' and she has been up with a poorly baby Izzy for most of the night. She has just dropped her son Edward to school and taken Izzy to the doctors and has picked up her prescription. Izzy has fallen asleep in the car on the way back home an hour before her nap was due. Hannah is disappointed as she really needed some down time and to check a few emails on her project at work. She really fancies a coffee as a pick me up and as a little treat, but Izzy doesn't transfer well from the car to her cot.

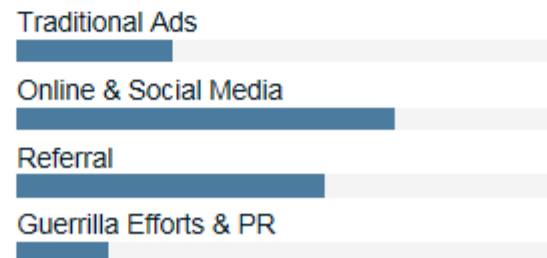
Motivations



Brands



Preferred Channels



Peter Bennett



"Service and quality is all but lost, but I love it when I find it."

Age: 72

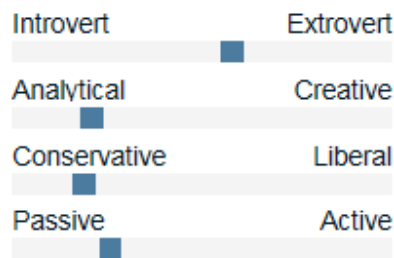
Work: Retired Concorde Engineer

Family: Married, 2 kids, 4 grandchildren

Location: Ripon, Yorkshire

Character: A little grumpy, a little funny

Personality



Sharing his achievements

Flirting

'Keeping busy'

Goals

- To be seen and remembered as a kind man that the world was better for having in it.
- To be respected.
- To keep busy and not become 'too old'.
- To enjoy the little things in life.

Frustrations

- Poor Service
- Feeling Rushed
- Bad manners
- Bad coffee

Bio

Peter likes to go for a walk to the city centre with his wife Sandra on market day and to enjoy and savour a coffee whilst she shops. Today his hip is playing him up a bit so he's not been out for a week or so and is frustrated and looking forward to his trip out. His Grandchildren visited for the weekend and he has not had much peace. He's looking forward to watching the world go by. He is very loyal to brands and expects to be treated well as a loyal customer.

Motivations

Incentive

Fear

Achievement

Growth

Power

Social

Brands

John Lewis

ASDA

BOOTH'S

Preferred Channels

Traditional Ads

Online & Social Media

Referral

Guerrilla Efforts & PR