

# Customer Experience Assessment Project



**Most Companies Are Delivering  
Ineffective Customer Experience.  
You Don't Have to Do So.**

**GCCRM**

# Why Good Companies Deliver Ineffective Experience

## Limitations of the Conventional Approaches

Nowadays, the challenge of customer experience management is that delivering a good experience is not good enough. You need to deliver an *effective experience*. Only when you're delivering effective experience, can you survive, grow, and create customer loyalty.

If you are running a business, whether you espouse CRM (customer relationship management), CEM (customer experience management), or any other customer management initiative, your ultimate goal is to make customers *feel good* so that they buy—more, more often and over a longer time—from you.

Customers feel good—or bad—about you via their five senses: sight, hearing, smell, taste and touch. They perceive the experiences delivered by you at various customer touch-points, for example product, advertising, in-store, call center, online, etc. The aggregate experience across all customer touch-points becomes how customers feel about you and your brand.

Since making customers feel good is essential to customer equity (value brought by your customer) and brand equity (value of your brand), it should be the top item on the agenda of every company to deliver effective experience at every customer touch-point. However, most companies using conventional approaches are delivering ineffective experience.

Why are conventional approaches not effective in managing customer experience? Here are the reasons to highlight the loopholes and limitations of traditional methods and tools used in measuring and managing customer experience:

- Conventional approaches usually focus on individual / uncorrelated satisfaction scores and are process-centric to improve the efficiency of operations; they typically ignore the emotional feelings of the customer;
- Conventional approaches usually drive enterprises to deliver homogeneous and non-branded experiences as they try to comply with the quality level set by renowned standards organizations or to achieve top grade customer satisfaction scores;
- Conventional approaches usually aim to excel in all aspects of an experience;
- Conventional approaches usually demand extra resources to enhance customer experience (given severe competition and the rapid increase of possible touch-points that a customer could interact with a brand or a company);
- Conventional approaches usually collect a huge batch of uncorrelated data and scores, and measure too many metrics;
- Conventional approaches do not usually provide a systematic way to guide resource allocation among multiple touch-points; and
- Conventional approaches do not usually provide an integrated way to assess, design and measure a branded customer experience, with no integration or synergy among different functions especially between touch-point operations and brand.

# What is Effective Experience

## Effective Experience is Not Equal to Good Experience

The *worst companies* make customers feel bad with *BAD* experiences. *Average companies* make customers feel good with *GOOD* experiences but these experiences are not effectively remembered or branded. They are just wasting resources. The *best companies* never forget about delivering their target brand values while they make customers feel good with *EFFECTIVE* experiences. So what is an effective experience?

### **Principle No. 1      An effective experience has to be remembered.**

Noble prize-winning psychologist Daniel Kahneman pointed out that people remember only two things during an experience: how they feel at the peak (whether the ultimate experience was good or bad) and at the end. These peak-end feelings summarize the whole experience process and are stored in the brain at a subconscious level. These feelings will eventually direct the next buying decision. The proportion and duration of pleasure or pain throughout the whole experience do not affect memories. People remember only the peak and the end.

### **Principle No. 2      An effective experience has to be branded.**

A branded customer experience works to amplify your brand through intentional and consistent delivery of on-brand experiences across all touch-points. Only when you are branded can you differentiate, only when you are differentiated can you have loyal customers. To optimize the branded experience, you have to deliver your most unique brand values and meet (or exceed) the most critical needs and expectations of your target customers through peak and end experiences.

### **Principle No. 3      An effective experience has to be contrasted.**

Carl Jung said, "*Even a happy life brings some darkness and the word happy would lose its meaning if it were not compensated by some sadness.*" People are comparison animals. Whether we feel good or bad are largely the result of comparison, our experiences cause us to set our anchors differently. We benchmark against different experiences (inter-experience). We also benchmark within an experience (intra-experience). People need pain to contrast with pleasure. The same pleasure feeling will be amplified once we go through some pain. Pain is a necessary "angel" when you design the customer experience. Not only does it help to contrast with the pleasures of the experience, but also to free up resources and release constraints.

**An effective experience creates positive emotions and memories, delivers differentiated brand values to target customers, and optimizes resource allocation.**

# The Beauty of Effective Experience

**You create your own blue ocean with a unique branded customer experience.**

**Enhance Genuine Customer Satisfaction.** *Effective Experience* maps the customer emotions in a natural time sequence and is experience-centric to improve the effectiveness of experiences. It addresses the emotional feelings of a customer and is much more powerful in measuring customer experience; it helps to enhance genuine customer satisfaction.

**Differentiate from Competition.** *Effective Experience* enables enterprises to focus on the most critical needs and the most important brand values of different target customer segments by designing and delivering differentiated experiences to reflect their target brand values; it creates a branded customer experience which is different from competitors.

**Create Results-driven Experience.** *Effective Experience* indicates where and to what extent you are wasting resources and/or not allocating adequate resources to particular aspects of an experience. Excelling in all aspects is not only inefficient, but also ineffective. Pains are as necessary and vital as pleasures during an experience process; it ensures a results-driven experience.

**Optimize and Justify Resource Allocation.** *Effective Experience* delivers branded experience by utilizing the same amount of resources to optimize the allocation among sub-processes within an experience, and provides a framework to choose the right mix and sequence of sub-processes; it fosters an optimal resource allocation among sub-processes of a single touch-point.

**Synergize Multi-channel Touch-Points.** *Effective Experience* provides quantifiable data and metrics, offers systematic and effective ways to justify the resources allocated among multiple touch-points, chooses the right mix of touch-points and provides a framework to derive the optimal level of branded experience; it results in synergizing resource allocation and performance level among multiple touch-points.

**Improve Employees' Satisfaction and Productivity.** *Effective Experience* breaks down the customer experience into sub-processes and measures customer emotions in a cohesive and integrated manner. This method identifies and measures fewer, and the most important, metrics for benchmarking, measuring and setting KPIs (Key Performance Indicators). It helps to relieve the information-overload burden for management and the too-many-KPIs issue for operations and front-line staff as it focuses only on a few truly important metrics; it helps to improve staff satisfaction and reduces training cost and time.

**Integrate Into One Management System.** *Effective Experience* integrates the entire branded customer experience management and synergizes different functions by realigning evaluation, planning and implementation into one system which is quantifiable, customer-centric and effective; it results in building an effective management team and system to deliver branded experience to the customers.

# Customer Experience Assessment Project

## Project Description

**The Customer Experience Assessment Project** is designed to evaluate the current experience level of your customers and the baseline performance of touch-points—methodology based on the skeleton of the U.S. patent-pending Branded CEM Method—for the creation and delivery of effective experience to your target customers. The assessment project is composed by the Pre-Qualification Workshop to **equip your people**; the Experience-Centric X-VOC Survey to **locate where you are**; and the X-MOT Analysis & Recommendation to **design your target experience**.

## Project Objectives

- **Equip Your People**—the customer experience project team—with the proper concepts and capabilities in managing results-driven experience by taking a paradigm shift from efficiency to effectiveness;
- **Locate Where You Are**—maps the customer emotions and derives the moments of truth—at a single and the multiple touch-points by conducting the unconventional experience-centric X-VOC survey;
- **Design Your Target Experience**—your effective branded experience—by analyzing the current effectiveness in creating positive emotions and memories to your target customers, delivering target brand values and optimizing resource.

## Project Phases

PHASE

1

**The Pre-Qualification Workshop** equips the customer experience project team the proper concepts and the right tools and skills in managing results-driven experience. This phase is fundamental to **equip your people**—by taking a paradigm shift from efficiency-driven to effectiveness-driven—to be able to design, deploy and assess effective customer experience, and to be qualified to participate in project phase two and phase three.

PHASE

2

**The Experience-Centric X-VOC Survey** maps the customer emotions to reflect the current experience level of your target customers and the baseline performance of touch-points. This phase **locates where you are**—by conducting X-VOC surveys on multiple touch-points such as in-store, online, call center, B2B—to build a solid foundation for the X-MOT Analysis & Recommendation in phase three.

PHASE

3

**The X-MOT Analysis & Recommendation** analyzes the experience effectiveness levels in branded experience, balanced experience and resource optimization. This phase facilitates the **design of your target experience**—by recommending how to synergize the multiple touch-points and optimize each single touch-point—for the creation and delivery of your own unique effective branded customer experience.

# Phase ONE—Pre-Qualification Workshop

## Phase One Description

**The Pre-Qualification Workshop** equips the customer experience project team the proper concepts and the right tools and skills in managing results-driven experience—based on the skeleton of the CEM Professional Certificate Program and the Effective Experience Framework—by taking a paradigm shift to **equip your people** from efficiency-driven to effectiveness-driven. The workshop includes a two-day training program and a validation test to qualify the team members in designing, deploying and assessing the effective customer experience.

## Phase One Goals

- **Create Effective Experience Strategy**—enable the attendees to learn how to formulate effective experience strategy by deciding the target customers, brand values and the target experience level;
- **Deliver Effective Branded Experience**—enable the attendees to learn how to allocate resource by synergizing multiple touch-points and optimizing single touch-point;
- **Evaluate The Experience Effectiveness**—enable the attendees to learn how to assess the effectiveness of touch-points in creating positive emotions and memories, delivering target brand values and optimizing resource.

## Phase One Content

### Day ONE Workshop—Foundation

- Effective Experience Principles
- Effective VOC
- Effective Experience Strategy
- Effective Touch-Point Planning
- Branded Customer Experience Management

### Day TWO Workshop—Applications

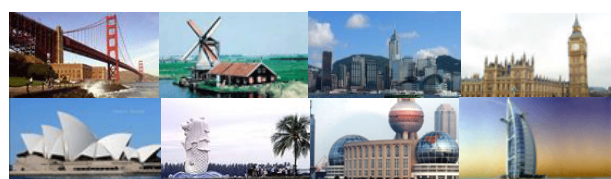
- Design Target Branded Customer Experience
- Optimize a Single Touch-Point
- Synergize Multiple Touch-Points
- Derive Emotion Curves & Identify X-MOT
- Evaluate Customer Experience Effectiveness

### Validation Tests

- Effective Experience Concepts
- Effective Experience Applications

## Customer Experience Management (CEM) Professional Certificate Program

is endorsed by nine authorities and designed by 15 GCCRM International Partners from North America, Europe and Asia. This 2-day course applies CEM essentials, strategies and methodologies to Marketing, Sales & Service, providing a framework with relevant guiding principles and tools for designing the best experience for your customers and equipping attendees with knowledge to apply to their business immediately. The program is conducted in London, Amsterdam, San Francisco, Singapore, Hong Kong, Shanghai, Dubai and Sydney. For details, please visit: <http://cemcertification.gccrm.com>.



# Phase TWO—Experience-Centric X-VOC Survey

## Phase Two Description

**The Experience-Centric X-VOC Survey** is designed to map the customer emotions to reflect the current experience level of your target customers and the baseline performance of touch-points—based on the X-VOC Research Methodology in conducting surveys on multiple touch-points such as in-store, online, call center, B2B—to **locate where you are**. This phase includes the pre-survey requirements alignment, the design of X-VOC survey questionnaire and the monitoring of X-VOC survey program.

## Phase Two Goals

- **Build CEM Assessment Foundation**—defining your target customer segments and brand values—to reflect the experience effectiveness of any touch-point experience to your customers and to the brand;
- **Collect Genuine VOC @ Experience**—with proper sequencing, selection and classification of different sub-processes at each touch-point—to map the genuine customer emotions during an experience;
- **Maximize Survey Effectiveness**—by surveying the right targets at the right time in the right way with the right media—to maximize the response rate, the accuracy of data and the depth of insights.

## Phase Two Content

### Pre-Survey Requirements Alignment

- Define Target Customer Segments
- Determine Perceived and Target Brand Values
- Identify X-VOC Survey Segments
- Select X-VOC Survey Touch-Points

### X-VOC Survey Questionnaire Design

- Touch-Point Mysterious Visits
- Stakeholders' Interviews and Surveys
- Standards and Practices Cross-Referencing
- Sub-Process and Questionnaire Identification

### X-VOC Survey Program Monitoring

- Decide Touch Rules
- Arrange and Manage Survey Logistics
- Trial Survey, Review and Refinements
- Survey on Live & Data Collection

## X-VOC Research Series—Multiple Touch-Point

In the Customer Experience X-VOC Research Series 2007 conducted by GCCRM and the research partners, they are focusing on in-store (Starbucks), retail (supermarket), online (eCommerce), call centre (in-bound) and B2B (IT solution). We break down the entire customer experience into different major and relevant sub-processes in natural time sequence, and measure the emotion feeling at each sub-process from an experience-centric perspective.



**Global Starbucks In-store Experience**  
GCCRM and CustomerThink Corp. (U.S.)

**Supermarket In-store Experience**  
GCCRM and CustomerSat Inc. (U.S.)

**Online eCommerce Experience**  
GCCRM and Web Analytics Assoc. (U.S.)

**Call Center Experience**  
GCCRM and CallCentres.Net (Australia)

**B2B Purchase Experience**  
GCCRM and CustomerCentric Sell (U.S.)

# Phase THREE—X-MOT Analysis & Recommendation

## Phase Three Description

**The X-MOT Analysis & Recommendation** is designed to analyze the experience effectiveness levels in branded experience, balanced experience and resource optimization—based on the tools and indices of the Customer Experience Assessment Management Model of the U.S. patent-pending Branded CEM Method—to **design your target experience**. This phase includes the current experience assessment, the experience effectiveness evaluation and the target experience recommendation.

## Phase Three Goals

- **Analyze Current Experience**—by mapping the emotion curves and the X-MOTs—to locate the current experience level of your target customer segments across various touch-points;
- **Assess Experience Effectiveness**—by deriving the experience effectiveness levels—to reflect the effectiveness in creating positive emotions and memories, delivering target brand values and optimizing resource;
- **Advice Target Experience**—by recommending how to synerge multiple touch-points and optimize single touch-point—to deisgn your own unique effective branded experience.

## Phase Three Content

### Current Experience Assessment

- *Emotion Curves* by touch-points by target segments
- *CIW / BIW* of each sub-process by target segments
- *X-MOT* on pleasure and pain for single touch-point
- *PPG / Unacceptable Levels* for single touch-point

### Experience Effectiveness Evaluation

- *CEI / BEI* of single and multiple touch-points
- *Branded Experience Level* of multiple touch-points
- *Balanced Experience Level* of multiple touch-points
- *Resource Optimization Level* of multiple touch-points

### Target Experience Recommendation

- Target Emotion Curves / X-MOT
- Optimal PPG / Unacceptable Levels
- Synergization of Multiple Touch-Points
- Effective Branded Experience across Touch-Points

**Customer Experience Assessment Management Model** is one of the three management models of the U.S. patent-pending **Branded CEM Method**—an effective framework to integrate the entire branded customer experience management process and functions by realigning evaluation, planning and implementation phases into one quantifiable management system—to gather the required data about the customer experience and to evaluate the current baseline performance of touch-points.

This management model includes the following tools and indices:

- Emotion Curve™
- X-MOT™ (Moments Of Truth @ Experience)
- PPG™ (Pleasure-Pain Gap)
- CEI™ (Customer Experience Index)
- BEI™ (Branded Experience Index)
- CIW™ (Customer Importance Weighting)
- BIW™ (Branded Importance Weighting)
- Experience Effectiveness Map™
- Branded Experience Level
- Balanced Experience Level
- Resource Optimization Level

# It is a Journey, Not a Destination

## A Closed-loop Management System

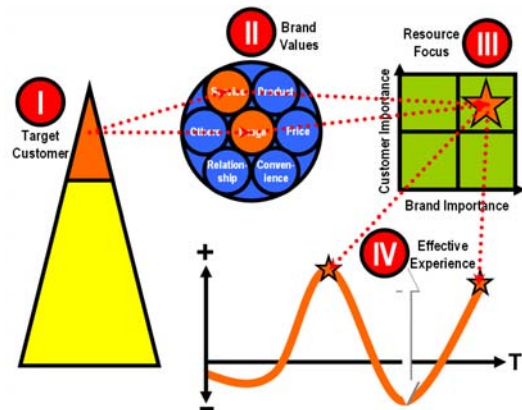
**Customer Experience Management** starts from understanding customers to formulating an effective experience STRATEGY to allocating resources at TOUCH-POINTS to delivering results—the feedback and outcomes of EXECUTION will be routed back to VOC for continuous improvement and development.

The skeleton of the Effective Experience Framework is based on the four core elements of the Branded CEM Method— X-VOC, X-MOT, X-Anchoring and X-Effectiveness—it provides a management framework with four modules in 12 components for the creation, delivery and assessment of effective customer experience. By applying the 80/20 rule to differentiate customers, needs, touch-points and sub-processes, you will be able to make a paradigm shift from efficiency to effectiveness in customer experience management.

[Effective Experience Framework 1.0] White Paper

Download: <http://downloads.gccrm.com>

## Effective Experience Framework



### I. VOC

1. Value of Customer
2. Voice Of Customer
3. Current

### II. Strategy

4. Target Customers
5. Brand Values
6. Needs Positioning

### III. Touch-Point

7. Synergize Multiple Touch-Points
8. Optimize Single Touch-Point
9. Experience Maps

### IV. Execution

10. Capabilities
11. Roadmap
12. Measures

*If you're planning or re-designing your customer experience management journey, one thing really critical is to locate where you are right now. Get it right from the very onset means steering your way to CEM success. Please address your enquiry to Miss Alice Tse: [alice@gccrm.com](mailto:alice@gccrm.com)*

## About GCCRM

GCCRM strives to help companies create effective customer experience. Since 2001, GCCRM develops customer value and customer experience management methodologies and tools, including the Branded CEM Method, the 3C Method, and the experience-centric X-VOC research. GCCRM offers multiple platforms in helping organizations to acquire necessary knowledge, tools and methodologies to create their own branded experience to their target customers. These include foundation training, knowledge transfer workshops, pre-project assessment, X-VOC researches and client specific consulting. For further details about GCCRM, please visit: <http://www.gccrm.com>.