

Phase5[®]



Customer Journey Mapping: *Driving a Customer Centric Culture from the Outside In*

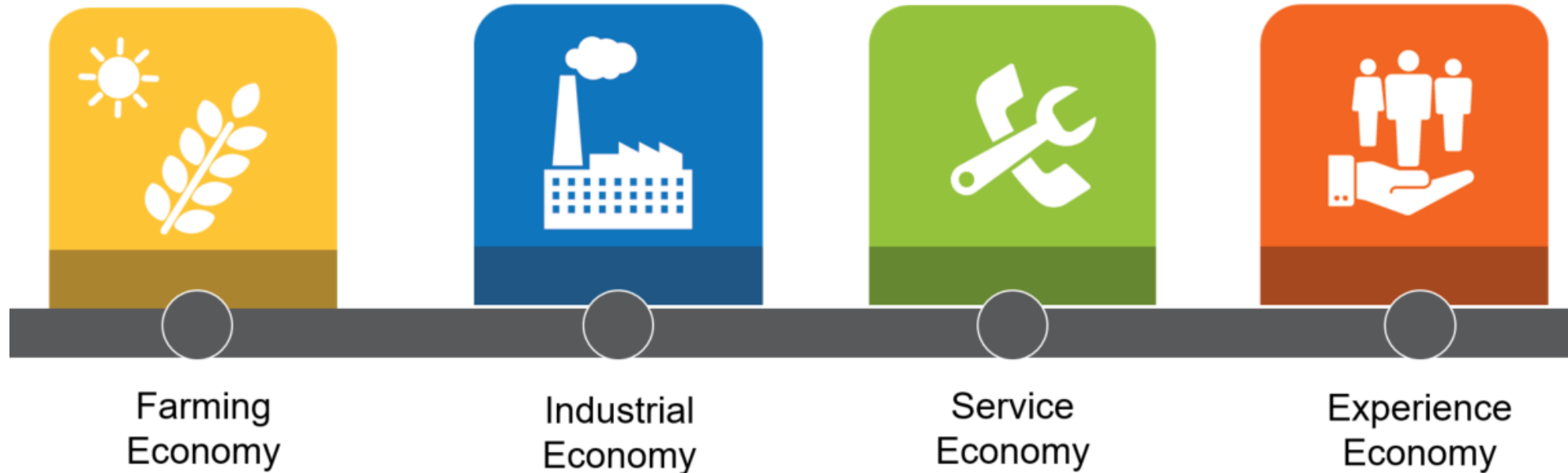
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Driving a Customer Centric Culture from the Outside In

Why? The evolution and continued growth of CX...



“The last best experience that anyone has anywhere, becomes the minimum expectation for the experience they want everywhere.”

Bridget van Kranlingen, IBM

Driving a Customer Centric Culture from the Outside In

What? Take the Journey - together

1

Strategy + Organizational Focus

- Start at the top!

2

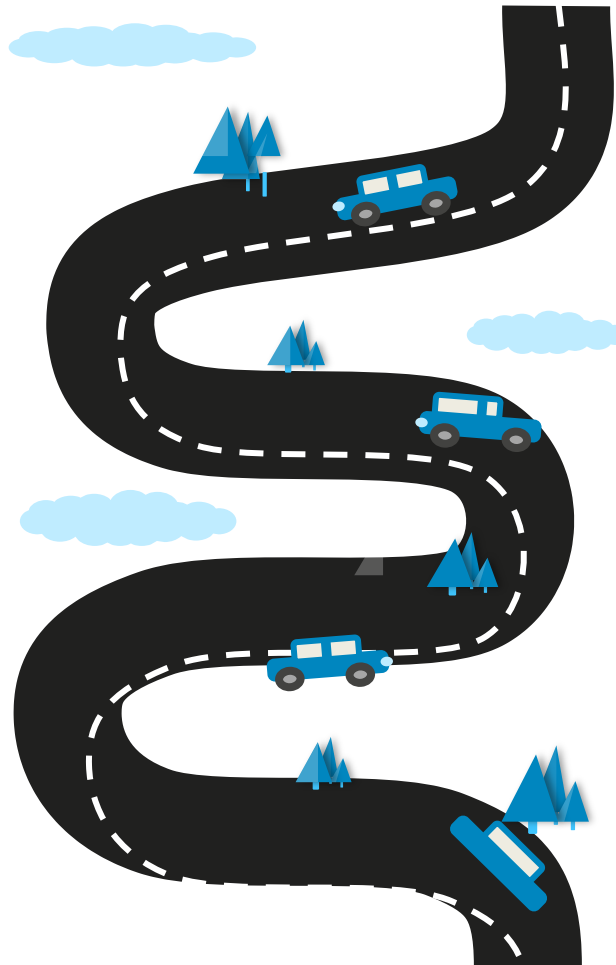
Education

- Start at the top!
- Every employee's role is critical

3

Set the Stage

- Define your customer
- Give them the spotlight!



4

Unify – from the Outside In

- Break down silos by uniting customers + employees
- Tackle the hard stuff!

5

Research, Research!

- Co-create foundational tools
- Connect research insights to every role and initiative

6

Ideate, Build + Celebrate

Driving a Customer Centric Culture

- How?**
- Partnered with Phase5 to co-create customer journey and empathy map of high impact, high visibility customer segment
 - Defined and validated key customer persona
 - Delivered foundational tools to allow employees to step into the customers' shoes

Key Learnings



DEFINE SUCCESS

- What does success look like?
- What customer segment is most challenging but reaps highest reward?



INVEST IN RESEARCH

- Align with trusted partner
- Co-create -what's in it for them?
- Talk about the lightbulb moments
- **Be prepared to pivot!**



EMBED IN YOUR CULTURE

- **Share, share, share**
- Align with new hire on-boarding
- Create customer wall

Important Aha's from FCT's CX Tools

The **Tales** We Told Ourselves and the **Lessons** We Learned

- **Empathy maps** got us closer to our **customer persona**, put ourselves in their shoes:
“Main Street” Law Clerk Sam
- **Journey maps** helped to illustrate Sam's cross-silo journey, both current state and desired future state
- Design thinking generated **ideas to solve a problem**, but **Victory Circle** provided critical stress test

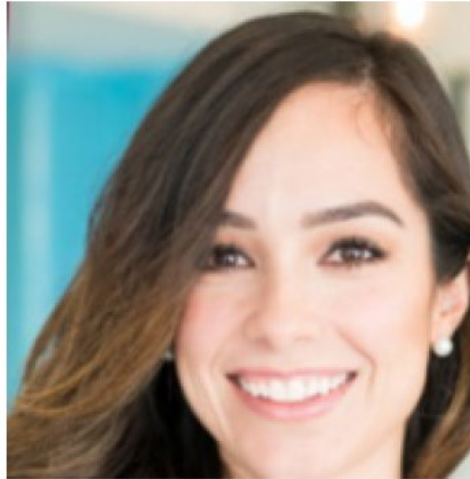


Lessons Learned from Sam's Empathy Map

What We Knew

- Works in small law firm
- Helps lawyers process real estate transactions
- Extremely organized
- True glue of law firm
- Embraces automation, improvements to workflow
- Moments of chaos cause considerable stress
- Energized, frustrated at times
- Uses FCT either frequently or selectively – lawyer decides, but she has considerable influence

What We Imagined



- Spirited, full of energy
- Strong achievement motive
- Really enjoys the work, explains long tenure

What We Learned



- ✓ Spirited, full of energy
- ✓ Strong achievement motive
- × Really enjoys the work, explains long tenure
- ✓ Confident, empowered, in control, “I got this!”

Our best chance to win with Sam meant delivering on these desired emotional benefits

Lessons Learned from Sam's Cross-Silo Journeys

- The journey map developed by internal stakeholders was largely validated, more positive sentiment than expected
- There was alignment on key pain points, for Sam and stakeholders (current state vs desired future state shown below)
- No one, FCT included, was getting her to 'wow' level and never across silos: major opportunity for creating omni experiences

Common theme at three points in the journey: “black hole,” inconsistent communication when something is flagged, questioned, or needs more due diligence by FCT.

Current CX

- Sam must be proactive to initiate contact when something is flagged
- Updates rarely happen without prodding which creates more work
- Limited transparency or visibility on progress
- **Process, steps and reporting channels used are inconsistent across products and platforms**

Desired CX

- Have acknowledgement that issues are flagged and why
- Outline what else may be needed
- Disclose when she will hear back
- Share updates proactively, even if there is no progress to report yet
- Know who is working on it so she may check in as needed
- **Greater consistency across platforms, products and channels**

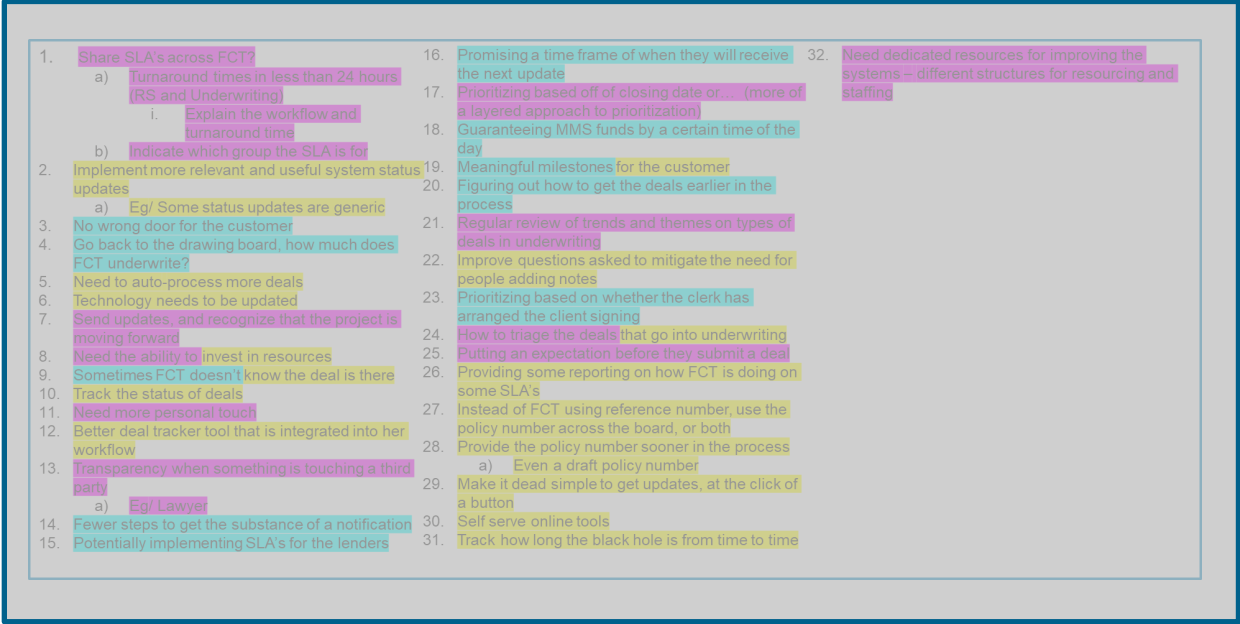
✓ **Confident, empowered, in control, “I got this!”**

Lessons Learned from Ideation, Victory Circle

- The team quickly developed 32 ideas to get Sam to her Victory Circle – a mix that touched on technology, business processes and workflows, and people

- It did not get us very far – we had to revisit this through three dimensions:
 - What is most important to Sam in her Victory Circle? Key feelings, core benefits** ✓ **Confident, empowered, in control, “I got this!”**
 - What will have the biggest impact on this?**
 - What is easiest to do now?**

- There was no alignment on b and c



Most Impactful on CX	Easiest to Do
5,5,5,5,5,5,5	1,1,1,1,1,1,1,1,1,1,1,1
22,22	11,11,11,11,11,11,11
2,2,2,2	25,25,25
6,6,6,6,6,6,6	22
15	17

We were left with two choices between short-term vs long-term CX priorities:

- Do what is easy and play in the margins**
- Do something bold, and own it**

Thank you!

5



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