

EXPERIENCE MANAGEMENT

FULL GUIDE





EXPERIENCE MANAGEMENT

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EXPERIENCE MANAGEMENT

Staying ahead of your competitors can be challenging when they have the same plan and goal as you – reaching and winning over your customers. The key is to truly understand the customers you target, always stay up-to-date about their desires and changing preferences, and using these learnings to make effective improvements. This is what we call ‘Experience Management’. Only companies that know how to thrill and please their customers will be able to retain them. Experience Management not only provides you with new comprehensive insights on what your customers do, but also why they do it, meaning you can act accordingly on these insights.

In this page we dive into the concept of Experience Management, its relevance for your company, and introduce you to the leading XM platform in the market; Qualtrics.

WHAT IS “CONTINUOUS IMPROVEMENT”?

Simply put, Experience Management provides your business with experience data, which is directly acquired as feedback from user experiences. This data is then combined with operational data, such as behavioural and transactional data. The addition of these two types of data, including their analyses, provides your business with actionable insights never before available, reducing the gap between your business’ experience offering and your users’ expectations.

In competitive markets, a streamlined user experience provides businesses with an essential differentiating factor. A trend that will only continue to grow in importance and effect.

There are four core experiences that can be measured with experience management: customer, employee, product and brand.

WHY EXPERIENCE MANAGEMENT

Data is the driver behind major decisions in the best companies in the world. Most of the data regarding user experience comes from tracking websites, social media channels, and customer service or sales channels. Therefore, this is all based on how customers engage with your different channels or departments, often further distilled to recreate customer journeys and personas.

“Combining experience and operational data provides the insights you need to make truly effective changes. If you see what went wrong and you understand why it went wrong, finding the right solution becomes easy. Experience data enables you to set the correct priorities and come up with ‘first time right’ solutions

However, companies never really get to the why behind customer behaviour.

This is where experience management comes into play, supporting you by adding an additional layer to this process. It eliminates the guesswork behind the static operational data and provides your business with experience data that would otherwise remain unattainable. Experience data provides relevant information about why your user behave a certain way or have a specific opinion.

Combining experience and operational data provides the insights you need to make truly effective changes. If you see what went wrong and you understand why it went wrong, finding the right solution becomes easy. Experience data enables you to set the correct priorities and come up with ‘first time right’ solutions. This not only allows you to make quick improvements to the customer experience, but also save you money.

The Qualtrics XM logo is positioned in the bottom right corner of the image. It features the word "qualtrics" in a lowercase, sans-serif font, with a registered trademark symbol. To the right of "qualtrics" is the letters "XM" in a bold, blue, sans-serif font. The background of the entire page is a dark, abstract image with numerous thin, light-colored lines radiating from the left side, creating a sense of depth and movement. The lines are interspersed with small, colorful dots in shades of blue, green, and yellow.

EXPERIENCE MANAGEMENT PLATFORM

For most businesses, four core experience are relevant when trying to stay ahead of the competition: customer, employee, product, and brand experience. An Experience Management (XM) platform connects, understands and interprets all relevant data collected from these core experiences. No small feat.

The data gathered by the XM platform is unmatched by other analytics platforms, collecting feedback data straight from your user experience. This type of data is extremely valuable, as it opens conversation with your stakeholders and reduces the gap between your offerings and customers' expectations. The insights generated by the platform are actionable throughout your entire organization – enhancing digital touchpoints, internal data, tools, and processes – helping you achieve key outcomes and goals. Lastly, the platform grants everyone in the organization access to these insights, using global or fully personalized dashboards. This allows your entire business to create, analyze, and distribute all data, and follow up with the appropriate actions.

“Qualtrics is one of the most robust and flexible Experience Management platforms currently on the market. Advanced features such as powerful analytics, AI, and machine learning all uncover deep insights from customer feedback and generate actionable recommendations that enable positive change.

Qualtrics is one of the most robust and flexible Experience Management platforms currently on the market. Advanced features such as powerful analytics, AI, and machine learning all uncover deep insights from customer feedback and generate actionable recommendations that enable positive change. A truly market leading platform.

SOME POPULAR USE CASES ARE:

- Customer Experience Management (CXM)
- NPS Software
- Employee Engagement Software
- Online Survey Software
- Market Research Software
- 360° Customer or Employee Feedback

“Working with Blended teams explains how you can Leverage internal and external expertise when needed, and how to maximize your team’s output while steering on business value.

EXPERIENCE MANAGEMENT PLATFORM

Having valuable experience data is one thing. But how can you put this data to use? The first time an important survey is activated, there will be a lot of interest in the answers. But this interest quickly fades away when follow-up survey results are less spectacular and other priorities resurface.

THEREFORE, THE KEY TO A SUCCESSFUL EXPERIENCE MANAGEMENT PROGRAM ARE:

- To develop a short / mid / long term strategy
- To embed the feedback data in your day to day way of working.

In the articles below we will outline two approaches that will help you to apply your Experience data in your daily tasks.

- ‘Continuous improvement’: explains why removing 100 small frictions is a strategic activity and why customer feedback is essential in this process - Working on customer feedback can impact every single aspect in your organization and will therefore require a broad range of expertise.
- ‘Working with Blended teams’ explains how you can Leverage internal and external expertise when needed, and how to maximize your team’s output while steering on business value.



CONTINUOUS IMPROVEMENT

WHAT IS “CONTINUOUS IMPROVEMENT”?

CI is focused on enhancing activities that drive customer value, while continuously removing waste or solving issues that cause friction. The ongoing process of generating options to improve is done from the bottom up, the place where the opportunities originate. This results in a large number of relatively small improvements in the day-to-day processes.

KAIZER

The term Continuous Improvement originates from the Kaizen methodology, which in turn finds its origin in the combination of two Japanese words: Kai (improvement) and Zen (good). We lose a little bit of its meaning in translation, but over time Kaizen has become widely known as ‘continuous improvement’. There are dozens of books and thousands of consultants who each interpret Kaizen slightly differently. But at its core, we can always identify these key components:

- Improve the process. Rather than focusing on the end goal, people should put their energy into figuring out the best way to get them there.
- Lead with evidence. An open-minded and experimental mindset is a great thing to have, but all Kaizen changes must be driven by data.
- Anyone can spur innovation. From the CEO to the employee in the store or factory, every member of the team should have input on how to make things better.
- There’s always a better way. A Kaizen project is never truly finished. Keep looking for ways to improve!

Kaizen practitioners are committed to staying aware of their surroundings, and feel empowered to step up and test data-driven alterations — even if doing so disrupts the status quo. The Kaizen approach also humanizes the workplace, and creates an environment where everyone feels free and empowered to contribute.

CONTENT & SCOPE

Although the original method is often applied to manufacturing processes, we can also use it to improve processes and interactions in the digital organization.

This immediately raises an important point: your continuous improvement initiatives do not need to be limited to, for instance, the checkout of your webshop. Instead, include everything that limits waste and enhances customer value. This also includes

internal processes, tooling and data, and all touchpoints across the customer journey.

If this potential scope sounds too good to be true, you can start by adjusting it to match your ambitions and capabilities. You could consider limiting yourself to improving the all touchpoints of the customer experience, a specific touchpoint such as the webshop, or a single solution (e.g. SAP Hybris or Adobe AEM).

Never forget that the true strength of the Kaizen method is the fact that there are no limitations. The filtering mechanism is not based on scope but on business value, ensuring every domain in your organization is unrestricted when it comes to optimizing their business value.

WHY IS CI IMPORTANT?

PRIORITIZE INITIATIVES BASED ON BUSINESS VALUE

CI focuses on business value instead of a list of predefined requirements. Since the business value of initiatives is liable to change, this means that CI is by nature an agile and dynamic process. CI doesn't automatically focus its efforts on UX improvements or the implementation of new tools and processes. The focus is always on whatever has the best cost to value ratio for your business.

SMALL THINGS MATTER

Companies tend to focus on big goals and outcomes, such as releasing a new product or service. These are the things they can grasp, plan, and allocate budget for. But these also tend to be the riskiest options. And even if a large project succeeds, the expected benefits or revenue usually turn out to be less impressive than anticipated, because reality is simply more complex than the models used.

At the same time, both customers and employees encounter small frustrations on a daily basis, that could easily be fixed with a little attention or small allocation of resources: a confusing message during checkout, an internal administrative task that's not adding value, or missing information about a customer that reaches out to you. There are a lot of small fixes and improvements up for grabs that can make everyone's lives easier and enhance business outcomes. However, in a top-down managed organization, the large, expensive, and risky projects tend to suck up all the resources.

The strength of Feedback driven CI is the ability to collect all these small issues and improvement options, prioritize them based on business value, and immediately start working on them. By grouping all these small issues, and embedding them in a process governed by a dedicated team, you will position them so they can actively compete with big initiatives, while at the same time giving each small issue the amount of attention it deserves. If done with full MT support and directed by a general sense of urgency, removing 100 small frictions can be a realistic strategic endeavour!

HOW CAN I MAKE MY CI PROGRAM FEEDBACK DRIVEN?

You can only learn and improve through feedback, a fact that is sometimes overlooked or simply ignored. “We’ll start focusing on our customers soon, but first we want to get this list of other improvements out of the way because they are so obvious”. The problem with this mindset is that this list of ‘obvious fixes’ never ends, and for every issue solved a new one is added.

How confident are you that you have a clear view on all feasible improvement options? And if you aren’t sure of the potential, how can you guarantee the existing list will give the best ROI? Without accurate and up-to-date input from your customers and organization, all improvement measures are based on a limited vision (full stop). There’s a real danger that you’re overlooking important options, quick fixes, and valuable opportunities. It’s common to lean heavily on a few select options based on personal experience, or advocated by the ‘loudest voice’ (often from the HiPPO* in your organization) (* The Highest Paid Person’s Opinion) .

The best way to counter this is by putting feedback at the core of your CI program.

Remember the Kaizen principles: anyone can spur innovation, and there’s always a better way. In the digital organization you can collect valuable input by setting up a structured feedback program, using a set of surveys and scorecards for instance, that continuously monitor the customer’s voice across different touchpoints, in addition to the employee’s input across the end-to-end process.

Using an application like Qualtrics can help you collect input from both your customers and employees across all touchpoints and channels, from all departments, in a well-structured and manageable way. This not only allows for insights into what is happening, but more importantly, also why they’re happening. This also improves the visibility of the project, by setting up custom dashboards featuring the initiatives and real-time results.

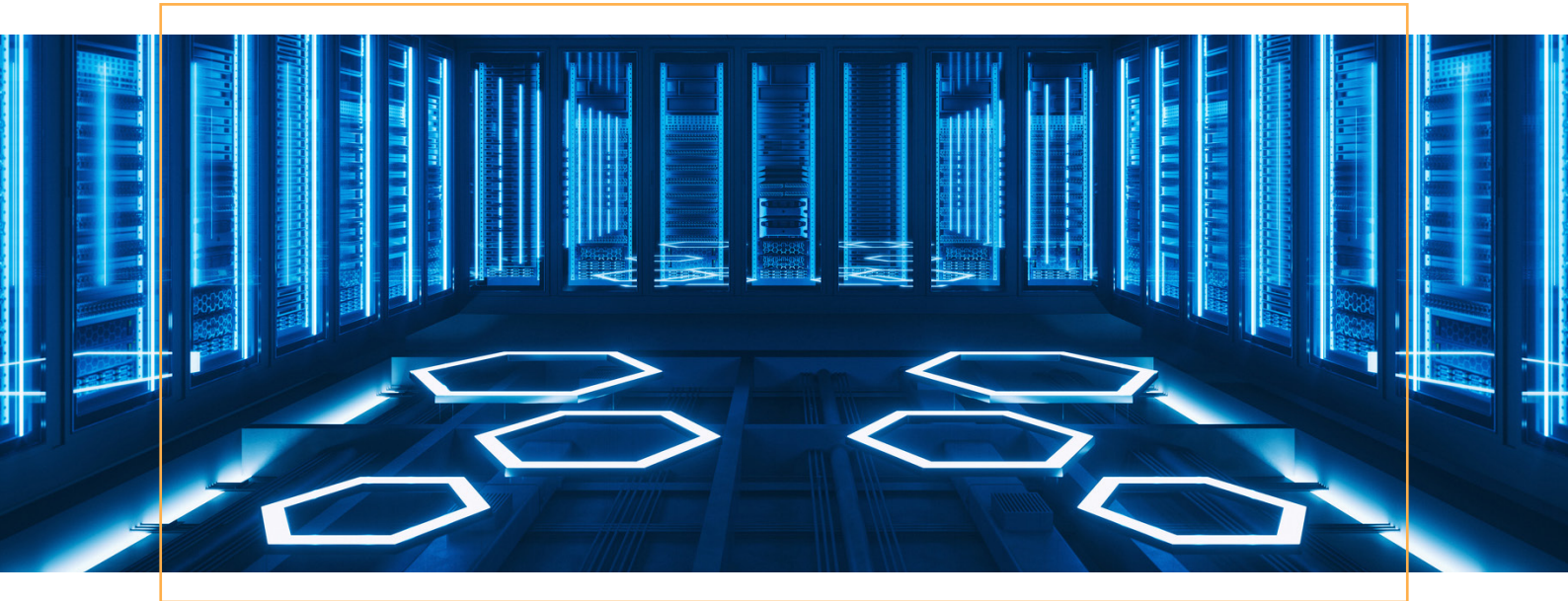
RETURN ON FEEDBACK

A word of caution; sometimes it might seem easy to collect feedback, so much so that we risk not valuing it enough and take it for granted. Always consider the time and effort the recipients put into giving you their valuable opinions and suggestions. Feedback isn’t free, and failing to deliver on it can easily backfire. To underline its importance, we came up with the term Return On Feedback.

Create awareness that collecting feedback isn’t free. It comes with the responsibility and promise to drive customer and employee value, with the end result of increased business value.

What business value did the feedback create exactly? Make the tangible output of the process transparent and accessible to both management and all participants. Quantify the results where possible, and explain why certain options didn’t make it to the top of the list yet.





WHAT ARE THE MAIN CHALLENGES OF CI?

Solving a bunch of small issues in a short timeframe might sound simple enough, but CI does come with its own set of challenges. Consider the following:

- From a management perspective, CI is harder to grasp and quantify than a traditional project.
- CI is managed based on business outcomes, not a set of functional and non-functional predefined requirements. This requires an entrepreneurial mindset from the team, which they may not be used to.
- CI requires solid integration into the organization. Management support is important for setting the right preconditions, giving authority to the team and product owner, and freeing up resources for executing the prioritized initiatives.
- Visibility within the organization is equally important, because the team needs continuous feedback in addition to support from the employees to get initiatives implemented and embedded in their day-to-day work.

Being aware of these challenges already gives you an edge when it comes to solving them.

“TCI is managed based on business outcomes, not a set of functional and non-functional predefined requirements. This requires an entrepreneurial mindset from the team, which they may not be used to.

“The key to a successful CI implementation is having a clear and correct process in place, based on accurate and relevant data. The latter should include both operational and experience data.

HOW CAN I MAKE CI SUCCESSFUL?

We already touched on the first Kaizen Principle: improve the process. Having a good process is a better way to success than simply focusing on the end goal. The key to a successful CI implementation is having a clear and correct process in place, based on accurate and relevant data. The latter should include both operational and experience data. Every process comes with its own share of pitfalls, but with the right preparation and a shared understanding of the method and its goals, you can make feedback driven CI a success.

BASICALLY, A STRUCTURED CI PROCESS SHOULD INCLUDE:

- A multi-disciplinary team
- Clear business goals and MT buy-in
- Reliable and up-to-date input data (O-data and X-data)
- A measurable goal for every initiative
- Flexible execution resources
- Proper tooling

We're sure you'll agree this is quite a hefty checklist.

QUESTIONS ABOUT THE CONTINUOUS IMPROVEMENT PROCESS?

If you need guidance or support with implementing a CI approach, or setting up a blended team, please don't hesitate to reach out to us.

CONTACT US



WORKING WITH BLENDED TEAMS

BLENDED TEAMS

When setting up your CI team, the goal is to have the right people available at the right time. One way of doing this is to apply the concept of blended teams.

WHAT IS THE ESSENCE OF A BLENDED TEAM?

The main point of working with blended teams is having access to a varied mix of people with different and varied capabilities, that can effectively and efficiently support the organization. A blended team should be set up so that input from all relevant disciplines is available and usable, with minimal waste.

TEMPORARILY ADDING SPECIFIC DOMAIN EXPERTS TO THE TEAM

The core team should be comprised of team members that work together for a prolonged period of time, not just when the improvement tasks are planned for execution. This means that certain roles related to specific tasks aren't necessarily part of the core team, such as a legal (GDPR) advisor, or a consultant specialized in search or the fulfilment process. The idea is that these roles can be added temporarily, only when they are needed and add value, and only for as long as they are needed.

ADDING EXTERNAL ROLES TO THE TEAM

To get the best and most up-to-date knowledge in the team, and stimulate a fresh outside-in perspective, external team members play an important role. Specific external domain experts can be added temporarily, but it's sensible to reserve at least one or two spots in the core team for external members. These can include an experience data analyst, a UX specialist, and a business or strategy consultant.

WHAT MAKES WORKING WITH A BLENDED CI TEAM SO DIFFERENT?

A properly set up, feedback driven, blended CI team has the potential to bring purpose to the entire organization, while at the same time break down walls between different teams and departments.

RESPECT EACH OTHER'S AGENDAS

In the context of blended teams and CI, talking about a team often refers to a virtual team with at least a few members allocated to multiple tasks or projects. This makes correct planning and having efficient processes in place all the more important. All members have to respect both the main events of the process as well as each other's agendas.

CREATE A BUSINESS VALUE FOCUSED MINDSET

Certain team members may need to get accustomed to the required mindset. One that's always focused on business value. But with CI the end goal is to reduce waste and increase customer value, so they have to be able to put their own personal preferences aside, regardless if this concerns their favourite development framework, personal aversion against sticky headers, or a long-cherished wish for Slack as a communication tool. These preferences can be considered of course, but only if a case can be made that shows, or at least predicts, measurable business value.

NURTURE CONSTRUCTIVE CRITICISM

A properly functioning blended CI team demands an open, respectful, and constructive atmosphere. Asking how any new project or initiative will lead to increased conversion and business value should be perfectly normal and accepted in any conversation. Constructive criticism needs to be nurtured.

ADVOCATE THE GOOD WORK

Last but not least, team members should be prepared to spend some of their time on advocating their work within the organization. The main task of the product owner will be talking to all the stakeholders, finding out their concerns, motivating them to provide feedback, in addition to making successes visible to everyone. Other team members should also make themselves available if people comment on the program, have any questions, or want to bring an important issue to the team's attention. This ensures the CI team becomes firmly embedded in the organization.

Having a genuine interest in people's daily struggles, showing commitment to solve these issues, and sharing both successes and failures, is what makes the sum of the team's efforts so valuable. Simply looking at all the individual improvements combined doesn't tell the complete story in this case.

HOW TO START A CI APPROACH?

AMBITION:

The first requirement is a sense of urgency. Does the organization truly feel the need to improve? There should be a genuine ambition to:

- Break down silos by giving people from different disciplines and departments a free hand in finding the most pressing issues and solving them.
- Empower the CI team to prioritize issues and have access to the right people at the right time.
- Give both customers and employees a voice that will be heard and acted upon.

Are you ready to empower a team and start improving your organization from the bottom up?

START WITH A WIDE SURVEY

A good approach is to start with a survey among customers and employees before the scope is set. You can limit the questions to customer experience and share the survey among both customers and employees, or focus on general improvements, both internally and externally. Make sure to mix closed questions, so you can measure the trend over time, with open questions that provide concrete input on what to do.

PROCESS

Start by defining the first version of the process, but be prepared to iterate and constantly make improvements too. Some things to consider:

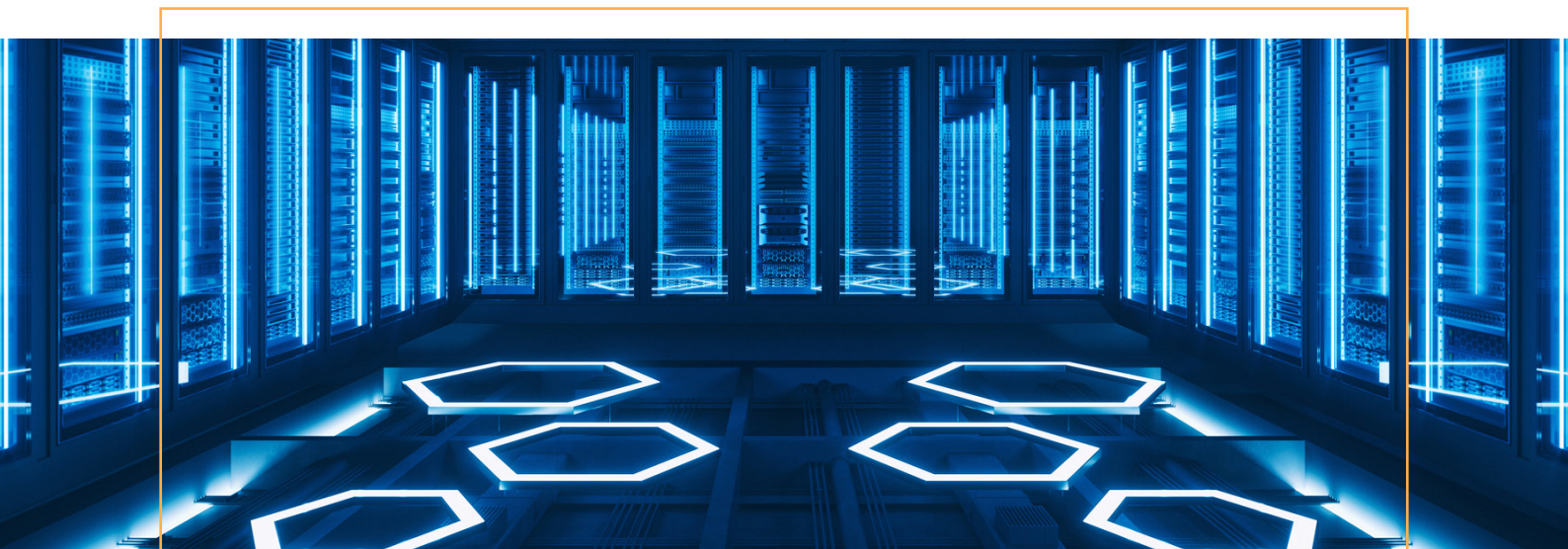
- Cycle time (e.g. 4 weeks, depending on the targeted area, statistical significance, and available resources).
- Allocation and detail planning of all participants, starting with the PO.
- Plan at least one face-to-face meeting per cycle.
- Define how and when to report on spent hours and tasks.
- Resource planning for executing the initiatives.
- Reporting on results and publishing them to the organization.

TEAM SIZE

Consider the optimal team size for this approach. In addition to setting up a core CI team also think about if and how you'll reserve time for other resources that are needed to execute the improvement tasks. A properly set up CI team has two layers:

- A core team including the PO, feedback analyst, data analyst, and some advisory roles (e.g. a UX specialist, consultant, and department manager).
- A (virtual) pool of resources to execute the improvement initiatives. These can be scattered over multiple departments, domains, and consist of both internal and external resources.

Reserving and enabling the planning of resources that are in high demand, and at short notice, will be challenging. As you progress you'll be able to better predict these needs and find a way to reserve resources ahead of time, or create a special pool of resources dedicated to the CI program.



THE BENEFITS OF CI AND BLENDED TEAMS

A CONTINUOUS IMPROVEMENT PROCESS WILL:

- Give all customers and employees a voice, and turn their feedback into concrete improvements.
- Guide the team in focusing on actual business value, not on predefined requirements.
- Offer structure and cadence to your improvement initiatives, making them more visible and easier to quantify.
- Not place any pre-existing limitations on target areas for improvement (unless deliberately added).
- Turn the removal of '100 small frictions' into a strategic objective.

A BLENDED TEAM WILL:

- Use all expert resources effectively (optimizing cost to benefit ratio).
- Apply different perspectives to the same challenges.
- Provide the flexibility to add highly specialized disciplines when needed.
- Provide a fresh outside-in look.
- Stimulate creativity.
- In general; activate the right people, at the right time and place.

APPLYING CONTINUOUS IMPROVEMENT WITH A BLENDED TEAM MEANS:

- Continuously increasing business value, by working on a dynamic set of goals, in a consistent cadence, with a team of specialized individuals.
- Building a shared understanding, by exchanging internal and external knowledge and experience.
- Optimizing the impact of every individual on the team in the least amount of time.
- Maximizing the Return On Feedback, ensuring that valuable feedback from your employees and customers leads to optimizing your business value.

TO SUM UP

A CONTINUOUS IMPROVEMENT PROCESS WILL:

Coming back to the 4 key values in Kaizen and explain their place in 'Feedback Driven Continuous Improvement'

- **Improve the process.** Process is key, starting with a core CI team with repeating activities, planned in a recurring rhythm.
- **Lead with evidence.** List improvements based on 'X data' and 'O data' and measure output based on quantifiable business value.
- **Anyone can spur innovation.** Stay integrated with the organization and question both employees and customers about their experiences and improvement suggestions
- **There's always a better way.** A Kaizen project is never truly finished. Keep looking for ways to improve! - This doesn't need any elaboration.



ABOUT OSUDIO

Osudio is one of Europe's largest e-business specialists. Having worked in e-business since the 90s we understand what works, what doesn't and what drives growth. Many of our clients are market leaders. Our goal is to help them evolve their business model so they can excel in every market or channel.

Osudio helps businesses reach B2B and B2C clients with a seamless experience in every channel where they are active. Through our expertise in product information management (PIM), we can create the right fundamentals for an Omnichannel presence including print. This provides the e-commerce solution that enables brand experience and drives sales.

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