



Kelton

7 STEPS TO UNITE TEAMS AROUND YOUR

**CUSTOMER
EXPERIENCE
STRATEGY**

Creating the ultimate customer experience strategy



The key to delivering world class experiences is, no surprise, a world class customer experience strategy — the kind of strategy that brings cross-functional teams together, differentiates your brand from your competitors, and drives exponential growth. **The question is, do you have a blueprint for CX success?**

Most companies don't. And if yours does, you undoubtedly know there are always ways to improve. That's why we're sharing our top customer experience strategies — strategies drawn from Kelton's 15+ years building brands people can't live without (and won't stop talking about). These tips will help you make bold decisions confidently and get your stakeholders working together to deliver experiences that matter.

Sound complicated? We've got your back.

Here are 7 steps to unite teams and transform your customer experience approach.



1. Embrace being unpopular (at the right moment)

Authoritative customer experience insights, even if they're at odds with a business priority, must be given a voice. So, first things first: **be prepared to speak up**. It might not win you any popularity contests at the start, but your colleagues will thank you later. When your organization decides who gets final decision-making authority — the user's needs vs. the businesses' objectives — here's how to take a stand.

How to do it: Move them with qual, convince them with quant.

TOOLKIT:

- **Qualitative Research:** Capture your audience in their element and tell their stories in a way that fosters empathy and inspires new ways of thinking. Be sure to capture images, audio, and video you can bring back to HQ so that stakeholders can truly “know” their customer's actual experience.
- **Quantitative UX Research:** Use survey data, traffic analytics, and segmentation/personas to support your stance. Marry your qual and quantitative insights together to create a realistic portrait of your users that everyone can rally behind.



2.

Understand your core target audience

It might go without saying, but you can't design an effective customer experience strategy without truly understanding your customers' wants, needs, current purchase journey, and overall perceptions of your brand experience.

How to do it: Get in the field, early and often.

TOOLKIT:

- **Hypothesized Experience Map:** Before you go into field, gather all your stakeholders together to create an experience map of your assumptions. From beginning to end and across touchpoints, map out what the group “thinks” is happening today. Turn that map into a poster, then reference back to it as your researchers return from ethnographic interviews. Speaking of...
- **Ethnographic Interviews:** Whether in-home, in-office, in-store or online, ethnographic user research helps your team deeply understand customer and employee preferences and behaviors. Plus: observing actions and behaviors — as well as identifying patterns and contradictions — can reveal subtle, yet high-opportunity, areas for innovation.



3.

Listen smarter

Once you understand your core customers' needs and current experience, use that insight to fuel your strategy and prioritize their voice. Find ways to continually listen to them and speak on their behalf internally. Then push for designs and design optimizations that make experiences **meaningfully and measurably better**.

How to do it: Leverage tools that create consistent listening feedback loops.

TOOLKIT:

- **Online Anthropology:** Use deep social listening to uncover real-life moments of brand experience (moments of delight as well as pain points) and what consumers are actually saying about your brand.
- **Current State Experience Map:** With the data you've collected in-field and online, create an experience map that visually communicates to your stakeholders what customers are actually thinking, feeling, and doing when it comes to your brand.



4. Build coalitions

The highest purpose of a customer experience professional is to act as the “connective tissue” between different teams of specialists by facilitating the construction of a **common vision for the future**. This helps cross-functional teams align on the real problem(s) to be solved. Build a coalition of the willing to get things done on behalf of your customers.

How to do it: Commit to both the employee and customer experience.

TOOLKIT:

- **Service Blueprints:** Expand your experience map to include a service blueprint. Service blueprints show the “backstage” (e.g. the employee experience) as it relates to delivering the “frontstage” (e.g. customer experience), showing teams how their individual contributions directly impact customers.
- **Design Sprints:** Facilitate collaborative workshops designed to create buy-in and uncover opportunities for innovation. Use these sessions to move from “problem identification” to “problem solving.”



5. Drive change from the grassroots — and the grasstops

“Executive buy in” is the energy source that gives life to most initiatives in organizations, large and small. But while getting the grasstops bought into your customer experience strategy is crucial, so is **galvanizing the grassroots** across your organization.

How to do it: Deputize top talent.

TOOLKIT:

- **Brand/Experience Ambassador Programs:** Take a “train the trainer” approach and deputize top talent to help others buy in and start making critical changes necessary for customer experience transformation. These groups should “recognize” top talent by putting them in charge of getting their peers fired up to make the changes, big and small, that enhance customer experience touchpoints across your organization.



6. Challenge the status quo

Change is hard. Advocacy, agitation and “disruption” are part of the CX process — as is tension when you’re pushing against organizational inertia to drive change for customers.

How to do it: Just. Keep. Going.

TOOLKIT:

- **Future State Experience Mapping:** Now is the time to create a map of what the future will look like if you optimize your experience to solve the most critical challenges facing your customer (and your organization). Pair this with collaborative storytelling exercises designed to build a shared vision for what’s possible.
- **White Space Identification and Mapping:** Better understand shoppers’ needs to identify opportunities for your brand — and leverage “how might we” statements to get your team in a problem-solving mindset.



7. Commit to the process

With so many stakeholders involved, the customer experience design process is about the competition of ideas. It can be uncomfortable and inconvenient. This is the root of iterative CX design. It's contentious... by design.

How to do it: Show your work by democratizing CX design.

TOOLKIT:

- **Training Sessions on Human-Centered Design:** Teach others about the principles and strategies that drive your work. Human-centered design is the foundation on which customer experience is built. Use trainings to create a common language for both communication and problem solving.



Customer experience in real life



Kelton helps companies understand and improve the customer experience to drive growth — including global brands like Target.

The Challenge: Target aimed to better understand the typical college student's journey by building empathy for their emotional experience, developing a shared understanding of key journey moments, and prioritizing those journey moments that would be an authentic fit for Target strategy.

The Solution: We undertook a multi-phase approach to our research by first deeply exploring significant milestones of the college student's journey. We followed this with an opportunity survey to size key moments and their importance, and finally a stakeholder workshop to build empathy and align priority opportunity areas for the brand.

WE LOVE TALKING ABOUT THIS STUFF.

Want to learn how Kelton can help you with your customer experience strategy?

Give us a call or drop us a note.

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