



*A few tips on...*

**PLANNING  
TO IMPLEMENT**

How do you turn customer experience design into delivery?

## PLANNING TO IMPLEMENT

### Designing your experience is one thing; implementing it is another.

The next step to think about is the implication for your people, processes and products – and how you align these to deliver the experience. Achieving the engagement of every employee and every department entails significant investment in education and training, effective teamwork, performance management, communications and technology. Focusing on a holistic approach will ensure the essential organisational alignment to deliver what customers perceive as a seamless customer experience.

### The first step is to get the right team of people together to implement it

Delivering your customer experience can only be achieved by aligning the whole organisation behind the brand promise. Successful organisational alignment means that Marketing, HR and Operations must have a collective role in the planning and implementation process. Here's a quick overview of the roles that each function can play in the process.

#### Marketing identifies who the target customers are and what they value. It then creates the brand platform that will position the brand with clarity

Marketing must then work with HR and Operations to define how the organisation can deliver this. It does this before communicating externally to the marketplace.

#### HR builds the skills and knowledge

HR has one of the biggest roles to play in the process.

It helps to communicate the promise to employees and will also work with Marketing to define the skills and behaviours needed to deliver the brand. From recruitment to retirement, each HR process either enables or inhibits the customer-focused organisation to deliver its promise. HR processes such as training, performance management and reward systems must all be aligned to the promise and delivery of the experience.

#### Operations creates the right infrastructure and processes

This includes defining and removing internal obstacles that get in the way and then focusing on strengthening the organisational 'enhancers' such as communication systems and technology that enable people to deliver consistently. Operations also helps Marketing to measure the customer experience, comparing this to what is promised and then feeding this back to the organisation.

#### How do you pull these functions together?

One option is to draw people from these functions and allocate them to a series of work-streams, aligned to your customer experience design. They will have responsibility for specific recommendations in their area and making sure plans are actioned.

When thinking about your planning, the project governance might look something like the framework on the following page:



The truth is, when you embark on the journey you can't stop halfway and say, "You know what, I believe in customer experience, but I'm not going to do that or we can't afford to do that" - because it only works when it all works

Ronan Dunne  
CEO, O2

## PLANNING TO IMPLEMENT

### Planning framework

#### STEERING GROUP

A small group of top level executives and Board sponsors. This keeps customer experience top of the agenda at Board level, keeps the leadership team engaged, ensures people get the support they need, and helps to eliminate organisational bottlenecks that get in the way.

#### PROJECT LEADER

Oversees the whole process, leads the core team and communicates progress. Acts as the conduit between the Steering Group and the Core Team.

#### CORE TEAM

Comprised of the work-streams. Drawn from each of the three functions, they're the doers, the people responsible for making things happen.

Workstreams	Roles & responsibilities
CUSTOMER EXPERIENCE	Responsible for the design of the new experience and delivering this in a differentiated and consistent way.
PEOPLE & BEHAVIOUR	Defines competencies, behaviours and skills that are on brand. Designs and delivers the training that will engage employees and managers at all levels. Links to recruitment, performance measurement and reward. Aligns employee experience with customer experience.
PRODUCT, PROCESS & TECHNOLOGY	Develops new propositions in line with the desired customer experience. Prioritises and guides product innovation, channel design, process improvement and the technology needed to help people deliver the desired experience.
BRAND & COMMUNICATIONS	Develops communications media with a tone of voice and visual style that is aligned with the brand. Responsible for the internal and external communication of the customer experience initiative.
RESEARCH & MEASUREMENT	Conducts/analyses customer research to arrive at new insights. Develops a balanced scorecard to measure pre and post implementation and track the ROI of the initiative.

## PLANNING TO IMPLEMENT

### In planning your implementation, here's a few things to keep in mind:

#### Get a good project leader or manager

Sounds obvious, but we've seen many an implementation get derailed through lack of committed project leadership and an over-reliance on consultancies to project manage it for them. Appoint someone who wants to do the job, has good organisational and people skills and who understands the organisation and politics. Pick someone with energy and enthusiasm. (It needs a motivator not an administrator). Then give them the time and support to do it.

#### Build in lots of time for executive involvement

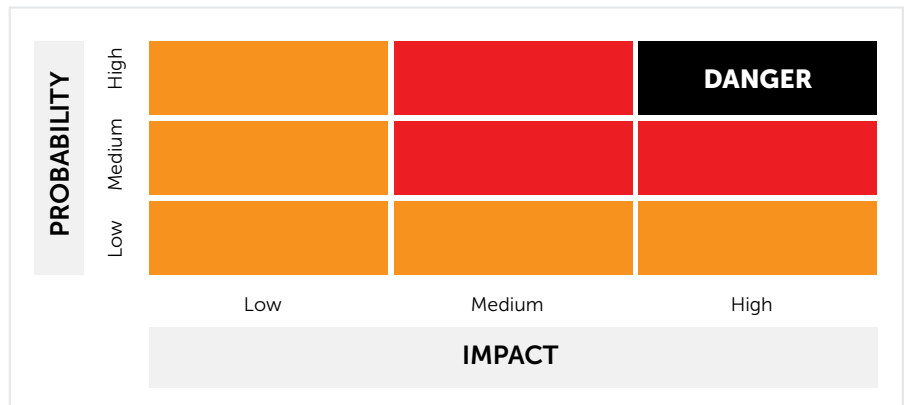
Get the initiative on executive meeting agendas right at the beginning of the project and keep this sustained throughout the implementation. Get your CEO to announce his/her commitment at the start, and use every opportunity to reinforce this commitment to employees. Keep the CEO personally involved through regular progress reports.

#### Plan communication right at the start

This often gets left to the last minute. People need to know what's happening, when, why and what they need to.

#### Align it with other initiatives

Ensure that messages and activities are aligned with whatever else is happening in the organisation. It's all too easy for employees to get cynical about 'yet another initiative' and conflicting priorities.



#### Build in early milestones to demonstrate success

This helps build commitment, sustain momentum and turn sceptics into advocates.

#### Keep people accountable

Circulate a regular update report where each workstream leader can detail progress against deliverables and flag up any potential blocks.

#### Establish ground rules: here are some we use:

- When in doubt, over communicate in all updates, reports and meetings. No detail is insignificant.
- Raise risks and issues sooner rather than later
- Bring solutions and options to the table, not problems
- Be proactive in removing barriers and obstacles
- Keep colleagues and peers informed and engaged

#### Assess potential risks to success

At the beginning, get your team to think about all the possible things that could derail your programme, and what you need to do to either avoid or handle them.

Think of some potential risks to successful implementation. For each, assess the probability of it happening? (High, Medium, Low), then assess the impact if it did? Then ask the following for those in the red zone:

**WHAT – do we need to do remove or mitigate this risk?**

**WHY – is this so important?**

**WHO – must we involve to avoid the risk?**

**WHEN – should this happen?**

**HOW – should it happen?**

Keep these risks flagged up on each progress report, until they no longer are an issue.

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### Need help?

One of the biggest questions may companies face at this stage, is *'do we need a consultancy to help us?'*

It's a good question. Consultants can certainly help with providing best practice advice and specialist expertise that you may lack in the organisation as well the experience of having done it before (Check that they have though)! Less valuable, but clearly important to some organisations, is the additional resource they can provide to supplement your own in-house people. However, we know from experience that bringing in consultants is no substitute for a committed and capable internal team.

So before you make your decision, it's worth spending time to really understand what resources and expertise you already have within your company and if there are gaps, whether these are best met by recruiting, promoting or training the right people rather than simply hiring in experts or additional 'doers'.

**CEM implementation is most effective when it's done by your own people, with your own people, rather than a bunch of consultants coming in and doing it for you.**

So we always recommend that where possible you resource the project as much as you can with your own people. They know your organisation, your culture, and hopefully your customers, far better than any consultant can ever do. Draw on your people's expertise, use every opportunity to build their expertise and then simply bring in the experts as necessary at key milestones.

But if you are sure you really do want to bring in some external support you may find it useful to see the Forrester report on Customer Experience Consultancies. You can find this in our Knowledge Bank, under *Choosing a Consultancy*.