


 Q&A

Keith Dawson

 VP &
 Research Director

Managing Experiences Across Roles

We increasingly define the success of modern business processes through the prism of “experiences”—what customers, users and employees encounter when they deal with technology and each other. Why has it been so difficult for organizations to design experiences for these different groups, and then to knit these experiences together into a whole?



It is true that many organizations have been examining the experiences they provide to many different groups, trying to make them more efficient and satisfying. But what makes sense or seems helpful in one context may not suit others. Members of each of those groups starts with a different set of assumptions for experiences based on their role and past history. Also, many of the processes that underlie experience delivery are siloed by department or function. An organization that is trying to provide a single, blanket experience to all-comers will have a very difficult time overcoming the diversity of expectations and the thicket of separate business processes.

There is a tendency in many organizations to view the different experiences among those groups as separate and unrelated, when in fact they are very much part of a unified overall journey and need to be jointly aligned to the organization’s strategies.

The goal is not necessarily a single, guided experience for all who interact. Instead, it’s a harmonized set of experiences that vary based on context, but that share some basic principles and values. For example, the way a customer uses a product in her day-to-day experience should be mirrored by the steps she takes to interact with a help system or an employee. Basic experiences should be founded on the simple premise that relevant information will always be available in a contextually meaningful format; that what emerges from one type of experience should not contradict any other experience; and that all types of experiences should be designed in tandem, so they share goals and success metrics. That’s how you provide consistency even when experiences are largely subjective to the experienter.

It’s also important to leverage Voice of the Customer and Voice of the Employee programs to capture and leverage unspoken views about experiences, essentially bringing those groups into the design process by listening to their concerns and preferences.



How have new modes of work and communication changed the nature of these various experiences? Are the changes going to be a permanent part of the business landscape?



In the new world of work, people are simultaneously more isolated (when working from home) and enmeshed with their coworkers through video and collaborative communication tools. This affects how they experience their tasks, processes, coworkers and customers. It puts pressure on organizations to foster experiences that are consistently informative, pleasant and productive, especially when outside situations like a pandemic upend normal expectations.

People's perceptions change and evolve constantly. Organizations need to be prepared to respond to and anticipate customer, employee, and user perceptions. Constant innovation is key to meeting these evolving expectations. One example is videoconferencing – when it first emerged as a universal communication tool early in 2020, there were few norms that guided behavior or fostered effective meetings. These had to be developed as people became familiar with the environment and learned what works and what doesn't. Over time a new normal emerged with a consensus on how to conduct video calls effectively. At that point the expectation for what an experience is like solidifies and an organization can use that expectation to design interactions that make sense contextually. Although customers, employees and product users have different needs in the moment, their experience expectations are moving in tandem, prizing clarity, efficiency and courtesy.

No matter which type of experience we're talking about, the outcomes now depend on robust internal and external collaboration and communication capabilities and a harmonizing of the information each participant has access to.

In recent years there have been some rapid and dramatic innovations in the way interactions are handled. These include everything from digital channels to AI chatbots and cross-departmental integrations. How should an organization prioritize the rollout of tools and technology that impact experiences?



Experiences depend on the robustness of the communications and collaboration infrastructure elements that are available, so as a rule of thumb, improving how that process flows should be a top priority. That could mean opening up new contact channels for customers, for example, or providing employees with knowledge, presence and chat tools, including digital assistants. Following that, an organization will need to deploy tracking and measurement systems to identify and correct any failure points or discontinuities that arise in an interaction. In many cases this will uncover processes that are unwieldy or out-of-date, as well as points at which information the employee, customer or user needs is inconsistent or unavailable.

Since the technology landscape is changing so quickly, it is less important to identify specific tools you need than to build a series of experiential rules and principles that guide an organization's overall approach. You can then select tools that further those principles and produce friction-free, unfragmented experiences.

One of those key principles should be to always listen, and incorporate customer or employee feedback into any effort at designing experiences.



With those priorities in mind, how should an organization assess the maturity of its strategy for designing rich and fulfilling experiences of all types?



Maturity is more than just where you sit on a technology continuum. It reflects how much an organization has assessed its capabilities and goals, and measured them against what is possible given technical and financial constraints. Maturity means knowing where the hard trade-offs are, and understanding what the consequences of different decisions will be.

Assessing maturity means having a firm grasp of customer expectations and behavior, often derived from analyzing calls and digital interactions and from feedback gathered automatically. It means gathering data about the employee experience, especially with regard to satisfaction and engagement. Another measure of maturity is an organization's readiness and motivation to adopt new technology and processes, and whether it has the skills to manage all of those diverse pieces of the experience.

Consider self-assessments, technology audits and the historical metrics that detail how experiences in the past (particularly siloed ones) impact things like customer lifetime value or revenue. It is also important to benchmark customer journeys, with attention to the parts of the customer lifecycle that hide in the shadows, like post-sales onboarding and repurchase plans. And on the employee side, a similar exercise would examine the experiences that an employee has starting with the hire, passing through training, incubation, performance tracking and gamification, and career pathways. The employee's experience mirrors and impacts the customer's experience (and vice versa).

There is a great deal of diversity and choice among vendors that build tools for orchestrating experiences. What are some of the most important criteria that a buyer should have in mind when making a decision among vendors?



Orchestrating experiences requires multiple systems to work together, which puts a premium on integration capabilities and an approach that takes into account the needs of people in different roles throughout the organization.

In addition, buyers should explore how vendors represent the experiential aspects of their offerings: how usable are the interfaces? How configurable and manageable is the system, especially for non-technical administrators? Buyers should also pay attention to issues related to system reliability and security. Any expectation of good experiences requires those bases to be covered.

Finally, since we are in a period of significant technological innovation, it makes sense for buyers to consider how any approach addresses specific business problems and supports mid- and long-term strategic goals. This avoids implementing technology that is new but untested and puts any platform on a more solid footing to show measurable results.



Keith Dawson - VP and Research Director, Ventana Research

Keith Dawson is responsible for Customer Experience (CX) research, covering technology that facilitates engagement to optimize customer-facing processes. His focus areas include agent management, contact center and voice of the customer, along with technology in marketing, sales, field service, digital commerce and subscription management. Keith's specialization is in natural language speech tools and the wide array of customer analytics.