# Measuring and Optimizing the Customer Experience

## How to Measure What the Customer Treasures —
## And Deliver it With Purpose

# Introduction

**Understanding the WHYs, Not Just the WHATs**

Customer experience (CX) has been described as everything from "the new marketing" to "the lifeline" of a brand's product or service, as the concept continues to evolve and be more closely scrutinized.

The CX Professionals Association (CXPA) defines CX as, "the perception that customers have of an organization – one that is formed based on interactions across all touchpoints, people, and technology over time." While Hubspot defines customer experience as "the impression your customers have of your brand as a whole throughout all aspects of the buyer's journey. It results in their view of your brand and impacts factors related to your bottom line, including revenue."

We tend to think of customer experience as the intersection between utility and emotion that occurs whenever a customer or potential customer interacts with a brand, a product or a service.

**There are three primary tenets to keep in mind when working to understand customer experience:**

- The customer experience is ultimately defined by the perception that humans have as a result of brand interactions.

- Humans are sentient beings, often driven by emotions.

- Purchases (customer experiences) are decisions/actions made by humans, often driven by emotions.

## The Martec Way

It is critical, when analyzing and working to optimize customer experiences, that those factors be woven deeply into the fabric of the analysis, even when using artificial intelligence or other technology to do some of the information gathering and processing.



In this guide, we will explore various techniques we rely on to gain those authentic human insights and emotions and will establish some industry terminology and definitions of our preferred best practices. We will also examine and explain those methodologies to illustrate how effective they can be in understanding humans, decoding their emotions, and ultimately creating customer experiences that generate brand loyalty and drive future purchasing decisions.

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# Understanding the Customer Journey

Brands are increasingly working to understand and map what's known as the customer journey: a visual representation of the pathway prospects and customers take to an eventual purchase (and even after one). What can often get overlooked in such analysis, however, are the emotional drivers that lie beneath the surface of the more open and obvious behaviors or actions those customers take. The risk is only superficially mapping actions or behaviors, without fully studying and understanding the emotional drivers behind them.

To us, it is in many ways more important to truly understand why a customer or prospect made a choice than it is to simply chart what actions were taken or decisions made. What might be invisible is a decision not to act, but what can be identified and charted is the motivation behind such lack of action. If the customer doesn't take the action the brand wishes it to, isn't it equally important to understand why they didn't click on a button, why they abandoned a cart, or why they simply left the physical or online store without purchasing?

The inverse is equally valuable intelligence. Why a customer chooses to buy, and when, and whether that customer can be retained, whether he or she will become a vocal brand advocate, and why that customer chose our product or service over a competitor's represent the secret sauce to replicating that behavior in others — creating customer experiences that drive future sales. But without understanding the why, you are more or less guessing at the what you are trying to replicate.

# The Entirety of the Customer Experience

Part of what is driving an increased interest in Customer Experience (CX) research is the multi-channel environment we live in these days, which has made it more challenging to map singular customer journeys, traditionally understood. We live in a world in which there are seemingly endless potential touchpoints between a brand and a potential customer.

In the modern media environment, there are three basic types of touchpoint: static, interactive and human.



Examples of touchpoints can include all of the traditional touchpoints of the past — TV and radio ads, billboards, print advertisements in newspapers and magazines, mail and postcards, customer service phone calls, in-store visits — along with a new set of more modern channels: website visits, promotional or marketing emails, online chat, social media posts, digital ads, online videos…the list goes on and on. Print media with permanence are static; email and social media are considered interactive; and phone calls and store visits are humanin nature.

# Predicting the Path to Purchase

**In simple terms, the customer journey can be mapped along these touchpoints to align with the typical stages the customer may cross:**

- **Awareness**
- **Consideration**
- **Purchase**
- **Retention**
- **Loyalty/Advocacy**

These days, however, the customer journey isn't always linear, which is why a counterpart to the conventional customer journey is **Predictive Path to Purchase**, an analysis of how a customer goes from being unaware of a product, category, or perhaps even their own need and moves beyond a purchase decision — in order to not only make informed conclusions about how future customers might follow similar paths, but to to optimize those pathways to encourage such journeys.

In any customer experience analysis initiative, we believe it is critical to study what's known as the **Voice of Customer**. Voice of the customer (VoC) research is the process of discovering the needs and wants of customers through quantitative and qualitative research. It is used to capture the voice of respondents to better measure and understand both customer satisfaction and loyalty. These qualitative insights into how customers feel about a product, service, competitor, or the category in general are extraordinarily valuable. VoC research helps to capture the motives behind consumer engagement, purchases, and brand loyalty, providing a considerable advantage to those who choose to engage in this type of research.

# Quantifying the Emotional Drivers

VoC research studies are various methodologies to understand the customer, whereas Martec takes VoC a step further using a proprietary methodology we call **Emotion Intelligence (EI)**. To better understand the consumer decision-making process in your market, unlocking the emotions that underlie each decision is critical. Our researchers leverage EI to uncover consumers' hidden opinions and associations to gain an unquestionable understanding of the decision-making process, not just an inventory of the decisions made.



Plutchik's Wheel of Emotions
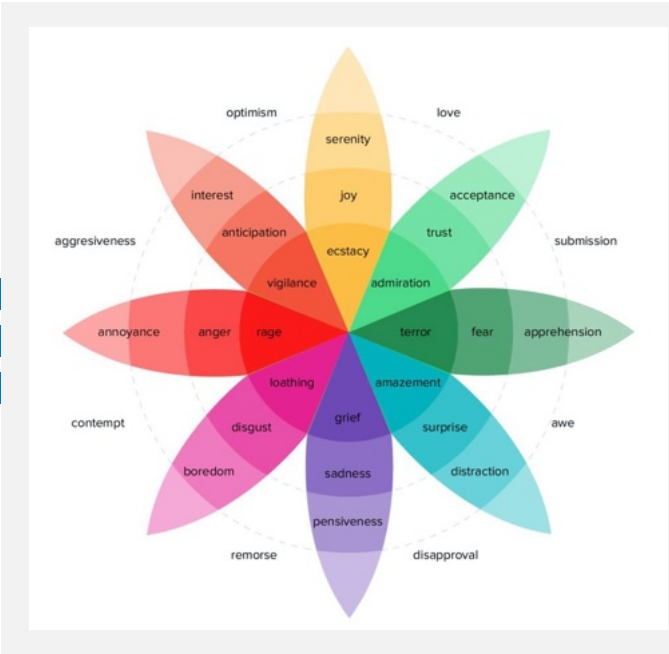
Advanced EI methodologies apply patented algorithms to uncover the hidden sentiments, opinions, and associations consumers have, based upon Plutchik's Wheel of Emotions.
The technology is simple yet versatile and can be applied to a range of possible data sources — surveys, research reports, social feedback, online product reviews, among others.

## The Martec Emotion Landscape
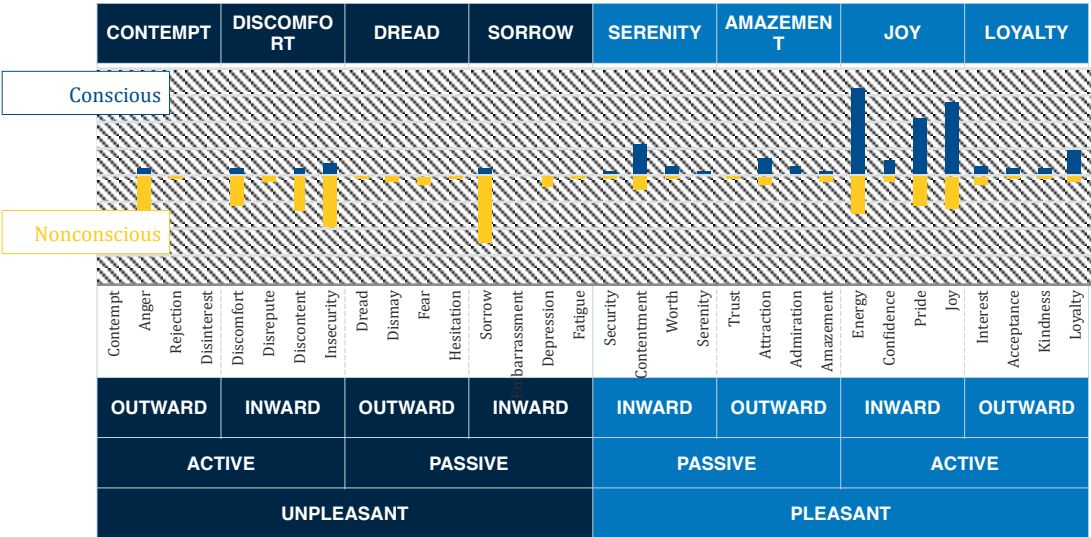
Researchers can even work to "quantify the qualified" aspects of emotion, using the Martec Emotion Score. The **Martec Emotion Score** is a numerical representation of the net level of pleasantness of emotions that are associated with a specific topic. Typically, the majority of emotion research is either solely qualitative or presented quantitatively in a highly scientific mode that is hard to digest and understand for laypersons.

The Martec Emotion Score gives these emotions a simple number that everyone can understand and, therefore, use as analytical data that can help reach specific business goals.

# Making Memorable Moments and Lasting Impressions
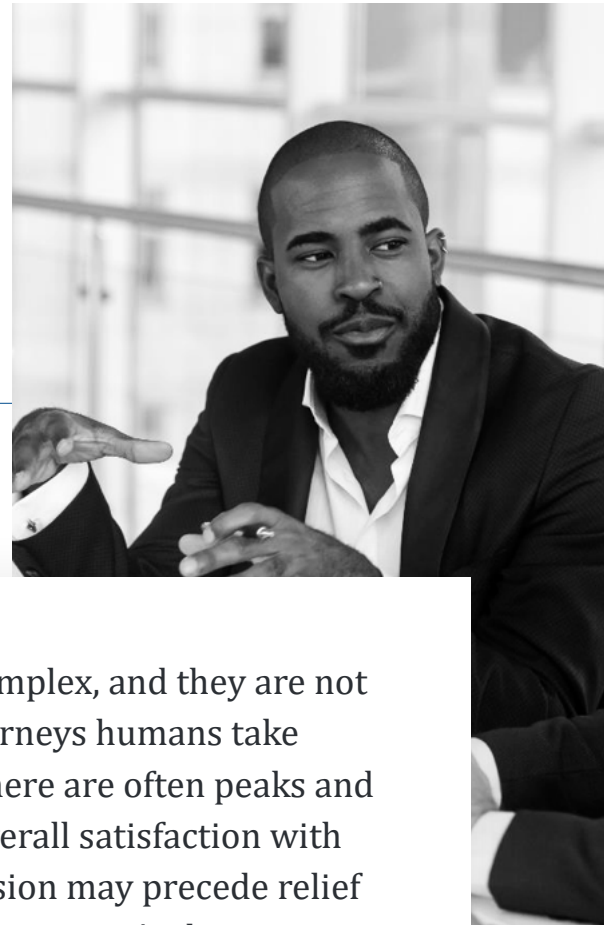
What's important to note is that emotions are complex, and they are not static for any one customer along the various journeys humans take when making purchase considerations. In fact, there are often peaks and valleys, even among those who would express overall satisfaction with an interaction with a brand. Nerves or apprehension may precede relief and excitement. Happiness may be later met with regret. And so on.

"Memorable moments" are those critical points in the customer experience that "make or break" the experience and work to define the broader relationship between a brand and customer.

These are critical, emotionally charged interactions that hold a lot of weight with the customer, and people are often willing to pay a premium for services that address these critical needs experienced during such moments. Consider these examples:

## Positive memorable moments:

| | |
|---|---|
| 🛒 | Making a purchase after saving so long for it |
| 🤝 | Putting an offer in on a home |
| 🎢 | Getting on your favorite ride at a theme park |

## Negative memorable moments:

| | |
|---|---|
| ✈ | Receiving notice of a flight cancellation |
| ⏳ | Waiting for inordinately long times to be seated at a restaurant |
| ⏱ | Missing out on Taylor Swift tickets after waiting online |

They're not always purchases, you'll note.

> **Knowing where those moments exist and understanding the human emotions that are experienced during them is the key to purposefully designing customer experiences so that the brand retains maximum control and influence to shape these moments optimally for the customer and prospect.**

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# CX Research Methodologies

The Martec Group advocates for what we call a "5-D" approach to optimizing the customer experience a company wishes to design and deliver to its existing and prospective customers:

| | | |
|---|---|---|
| **1** | **Discover** | Uncover critical CX pain points and challenges through in-depth discovery work with internal stakeholders. |
| **2** | **Diagnose** | Monitor, measure and document the current state of customer experience before you do anything to change it. |
| **3** | **Design** | Use the Double-Diamond Innovation framework to design CX concepts and test various proposed solutions to see how they will be received by the target customer and other stakeholders. |
| **4** | **Deploy** | Implement the appropriate changes to the experience and messaging, based on feedback received during the design and testing phase. |
| **5** | **Drive** | Drive action and monitor/track outcomes and changes, positive or otherwise, and analyze the data to determine what to continue, what to tweak, and where to potentially change course. |

Now let's look at four methodologies we use to not only understand the existing customer experience, but to optimize that experience for how an audience wishes to experience an interaction with a brand. Each of the following methodologies has different uses based on the CX needs and challenges of the brand and can often be used together to solve for several challenges at once.

# Voice of Customer
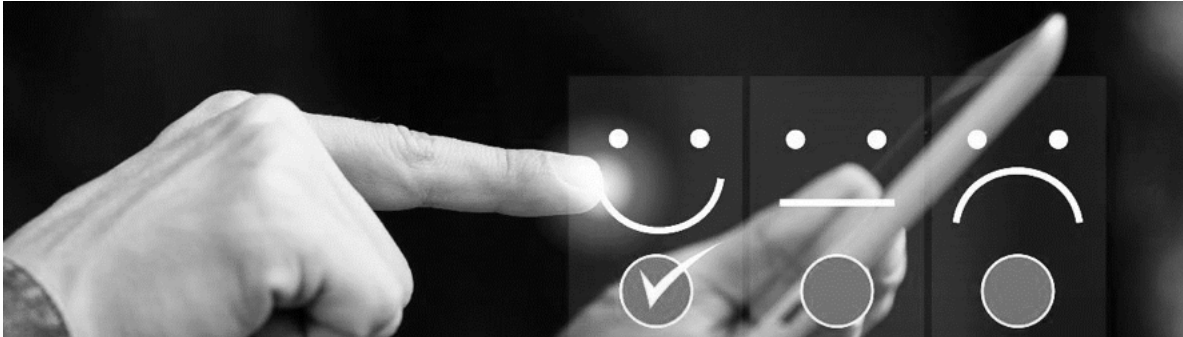


Voice of the customer (VoC) research is the process of discovering the needs and wants of customers through quantitative and qualitative research. It is used to capture the authentic "voice" of respondents to better measure and understand customer satisfaction and loyalty.

Importantly, a significant portion of such studies should be qualitative in nature, so that what is being captured is research participants' opinions, wants, needs and perceptions as expressed in their own words, whether through open-ended survey questions or, even better, qualitative techniques, such as focus groups, in-depth interviews, UX testing, online discussion forums, or ethnographic research.. We recommend combining qualitative research (understanding deeper context) with quantitative research (put numbers and metrics to the findings).

The other critical component sometimes overlooked is the study of audiences outside of the existing customer set. Gathering and analyzing opinions, perceptions and preferences of potential customers provides important insights that a brand may otherwise not consider, perhaps missing opportunities to gain market share and conquest competitors' customers.

This may include expanding the respondent pool or engaging in what's known as "social listening" — studying conversations happening in online forums, social media and other digital communities, where people freely express preferences and perceptions openly and without the filter of a survey construct.

One example of quantitative VOC research is an **Unmet Needs Analysis**, which pinpoints those aspects of an experience that customers have relatively high importance but low satisfaction, highlighting where the brand should focus in improving the customer experience.

Segment 1
## PLEASED PIPER – UNMET NEEDS ANALYSIS

Two hidden opportunities arise for Piper: Attributes 2 and 8.
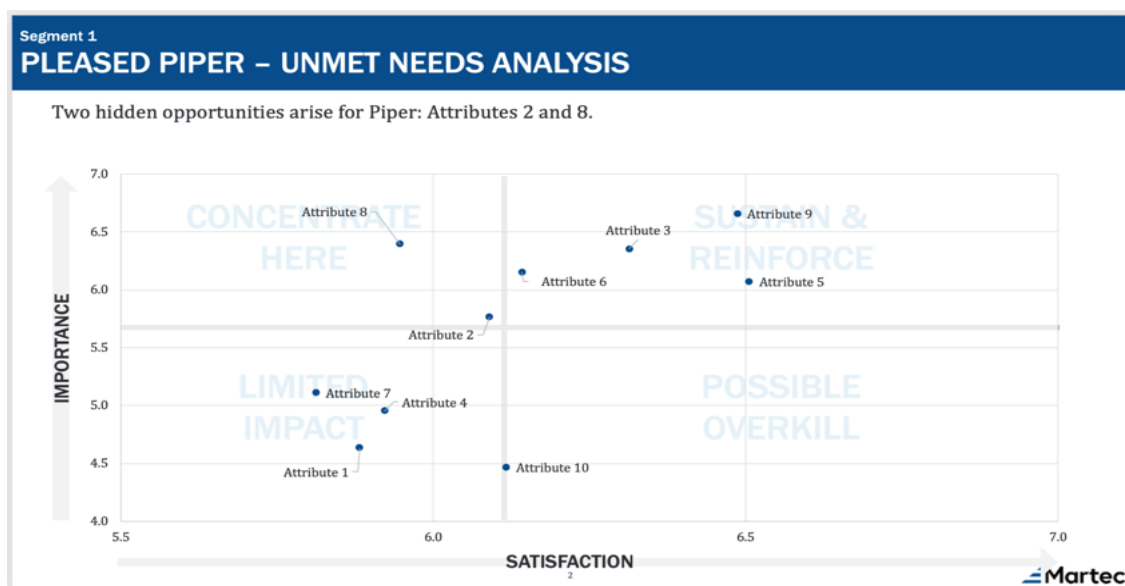


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Martec emphasizes the importance of integrating our Emotion Intelligence methodology into VoC research, so that the authentic and rich voice of (existing and potential) customers is understood through the prism of the emotions being experienced and how those emotions influence the perception of the brand interaction — whether pleasant or unpleasant, to varying degrees of intensity, and how active or passive that emotion may be at various points along the customer journey.

# Segmentation and Persona Development

Many companies are engaging in the practice of developing "buyer personas," but as is the case with VoC research, we recommend taking a more nuanced and detailed approach - one that includes audience segmentation as a first step. While many marketers will develop various customer profiles based on needs, we recommend a more holistic approach to customer segmentation and persona development that also considers inputs that influence purchases, emotions, and brand loyalty beyond those tacitly stated by the customer.

A needs-based approach studies the expressed customer needs in the process of making a purchase: what problem is being solved, what aspiration is being met, price preferences, convenience or ease-of-use, etc.

A more holistic approach will develop personas based on user behaviors and tendencies. This expanded data set might call into question website user statistics to study frequency of visit during purchases, length of stay per visit, cart abandonment contributing factors, how much money a user is willing to spend, and so on.

We find it critical to move beyond operational data to work to understand the emotions being experienced by each segment and at each stage of the customer journey. This mapping will often reveal nuances — or even obvious differences — from persona to persona, in the intensity and positivity of various emotions experienced along critical touchpoints.
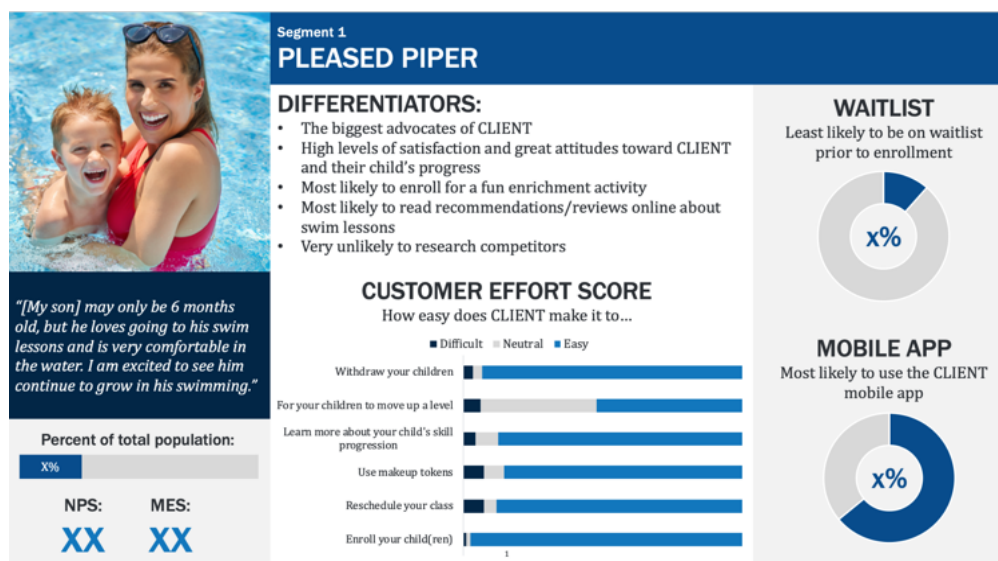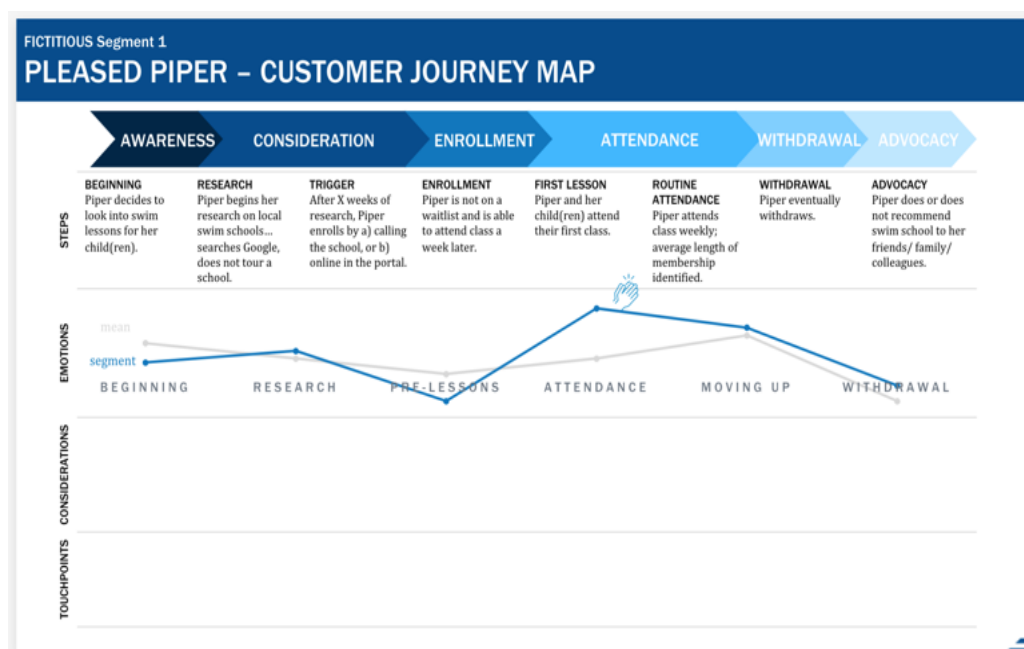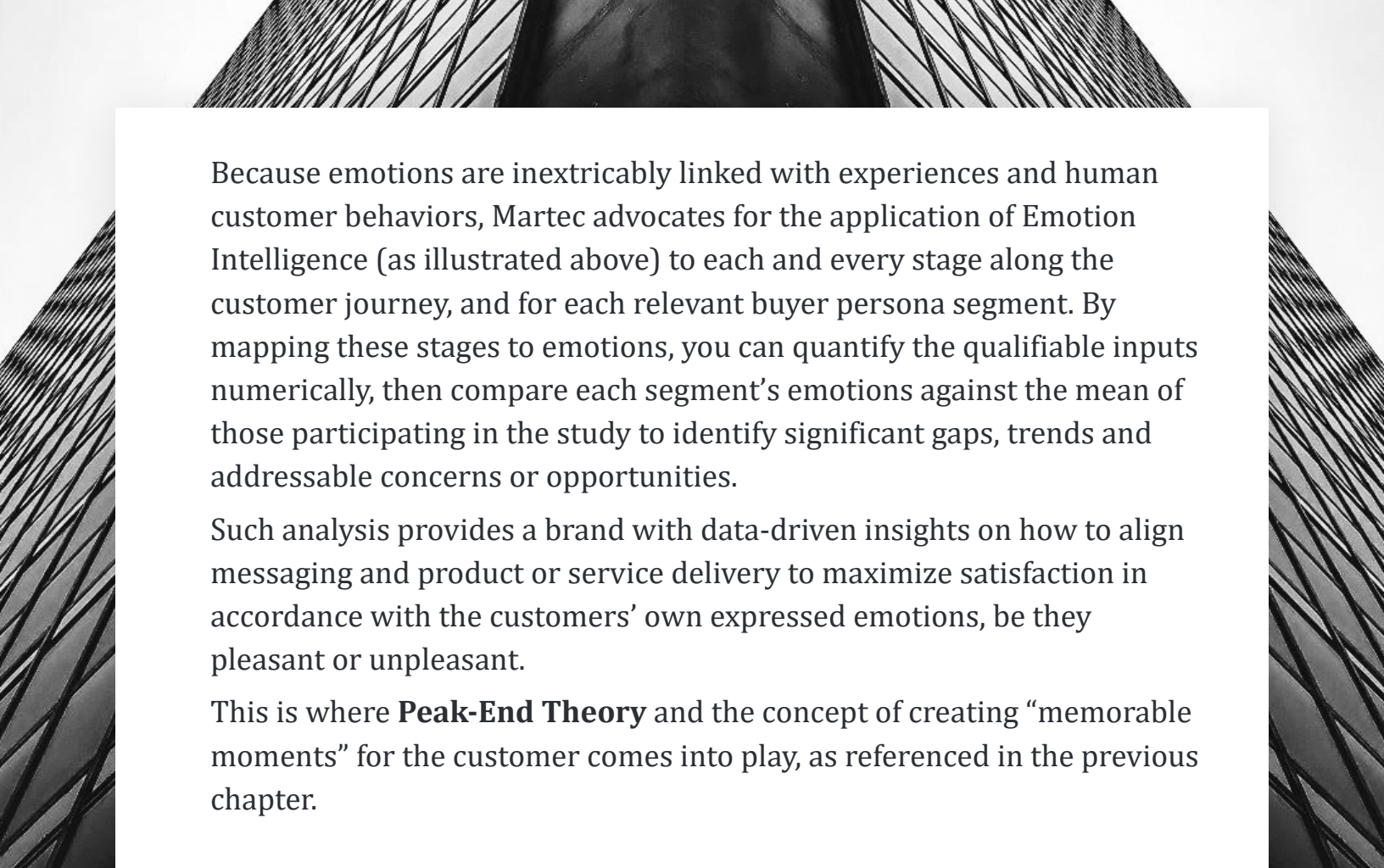
# Customer Journey Mapping

One pillar of Martec's CX research practice is customer journey mapping. Using a complement of qualitative and quantitative techniques, Martec isolates individual customer segments and creates a detailed map of their journey with a brand, product or service.

By focusing on each layer of the journey — each stage, step, emotion and touchpoint — and folding in the critical KPIs and business challenges and considerations, a holistic view is developed to help brands understand exactly where and how to touch their customers.

Martec applies our proprietary Martec Emotion Score to measure and visually demonstrate the "sentiment journey" — emotion mapping along the customer journey. This customer journey map shows the stages, steps, emotions, considerations and touchpoints that a customer undergoes during their experience with this client.

Because emotions are inextricably linked with experiences and human customer behaviors, Martec advocates for the application of Emotion Intelligence (as illustrated above) to each and every stage along the customer journey, and for each relevant buyer persona segment. By mapping these stages to emotions, you can quantify the qualifiable inputs numerically, then compare each segment's emotions against the mean of those participating in the study to identify significant gaps, trends and addressable concerns or opportunities.

Such analysis provides a brand with data-driven insights on how to align messaging and product or service delivery to maximize satisfaction in accordance with the customers' own expressed emotions, be they pleasant or unpleasant.

This is where **Peak-End Theory** and the concept of creating "memorable moments" for the customer comes into play, as referenced in the previous chapter.

## Peak-End Theory in Practice

The goal should be to create intelligence that is much more than a mere map, which simply demarcates events and behaviors along a timeline.

Closely examine how emotions change with each touchpoint (not only the purchase-related milestones), and study how emotions and perceptions might deviate from the product's or service's intended experience at each touchpoint, so that you can re-design and iterate wherever shortcomings reveal themselves.

Emotions at the peak and end, as well as those memorable moments that customers take with them even after a purchase, could very well represent the difference between a one-time customer and creating an enduring relationship with that purchaser, who could become a repeat/ lifelong customer and one that serves as brand advocate and referral source on the brand's behalf going forward.

# Testing (Concept, Messaging and UX)

Brands should consider market research also as a means to test concepts with smaller groups of people (and at less risk or exposure to the overall company and reputation) before rolling them out to the public at large.

Research can be used to "beta test" product or service iterations and innovations to determine how customers (or customer segments) will respond to them once fully implemented. This provides the opportunity to optimize the customer experience precisely and completely...and to the greatest possible extent at the least possible risk.

Real-world experiences can be monitored, analyzed and evaluated, using all of the methodologies we've covered above, so that the company making changes to its product, or its messaging, or anything related to the User Experience can do so with confidence and conviction.

**Market testing is of particular use and importance to those brands that might have multiple layers of customer cohorts. For example, franchisors have two primary audiences, each with its own motivators and preferences: franchisees as one and end-customers as the other.**

**If a change to the customer experience is being considered by the franchisor, it may wish to test this concept first with the franchisee audience, who is closer to the end-customer than the franchisor itself and may have relevant intelligence on customer perceptions that would impact whatever change is being considered.**

**A similar opportunity exists for wholesalers and product manufacturers, which serve a distribution or retail channel as one customer cohort, and the end-buyer as another.**

Testing not only insulates the brand from risk and error, it often saves considerable time and financial resources by allowing the company to roll out new ideas and test them before investing fully in a significant change of course that might prove costly and imprecise.

# What, Why, So What, and Now What

Effective CX research goes far beyond merely studying what is being stated by customers (and prospects). It is the hard work of learning the why behind the whats: drivers, influencers, emotions, impact, opinions, perceptions, etc. And beyond even the whats, Martec always wants to deliver the "So what?" and the "Now what?".

Once the Customer Experience is clearly understood, in terms of what it is (as perceived by the customer) and what it should be, a brand can work with confidence to optimize future customer engagements.



**_So what_ tells the company why, and _Now what_ paints a data-driven picture of what the future will hold, once the Customer Experience is engineered for maximum customer satisfaction, engagement, retention and loyalty.**

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# Six Metrics Used to Measure and Optimize Customer Experience

This chapter provides an overview of the most common metrics used to help brands understand customer perceptions and inform decisions to improve experience. It is important to note that, while all of these measurement approaches are important on their own, none by itself represents the complete and exhaustive measurement of customer opinion. Rather, it is the application of many (or all) of the appropriate tools that will provide the most accurate and holistic measurement of customer perception — including one critical metric that is unique to The Martec Group and the brands we work with.
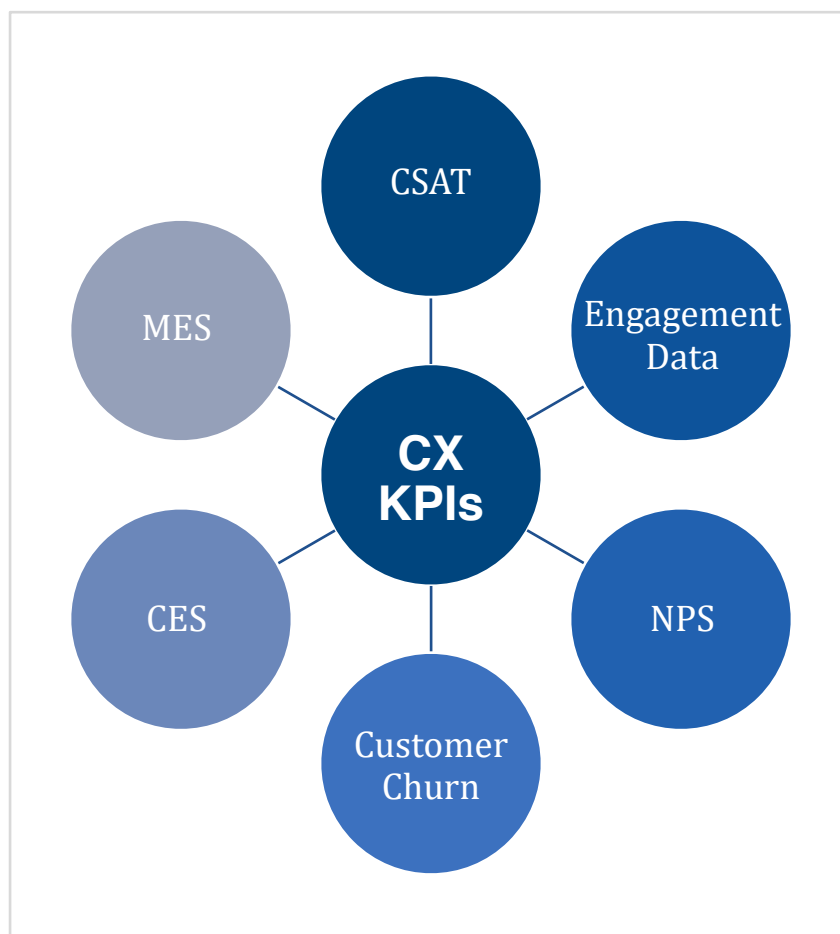
# 1. Customer Satisfaction (CSAT)

Customer Satisfaction (CSAT) is a very common measurement of — as the name suggests — customer satisfaction with a given brand, product, service or experience. Satisfaction is typically rendered numerically, based on various survey instruments or customer conversations.

**While CSAT is a common (and historically valuable) reflection of customer feedback, we stress the importance of measuring satisfaction along multiple discrete touchpoints a customer may experience,  in addition  to gauging overall satisfaction with the brand, product or service on the whole.**

In fact, you typically want to pinpoint gaps, challenges, or successes, so the brand can take an informed approach as to what, specifically, needs to be changed or amplified to maximize satisfaction.

# 2. Engagement Metrics

Engagement metrics are a category of measurements used to understand the customer's interaction with the brand, such as clicking through emails, purchase frequency, or likelihood that a given customer will take various actions going forward. While the most obvious might be to ask how likely the customer is to purchase again, other likelihood metrics include willingness to refer a friend, revisit a website, consider another complementary product line, or leave a positive review.

In actuality,  any operational data that a brand can capture about a customer can be considered some form of engagement metric: customer service calls, how long customers leave things in their cart, purchase frequency, and so on.

**Such measurements serve to understand the loyalty aspect of the customer experience. In these studies, we are working to understand the relationship that exists between a brand and its constituents, rather than merely measuring a past transaction.**

**You might say that engagement metrics are not just backward-looking, they are forward-projecting as well.**

# 3. Net Promoter Score (NPS)

Net Promoter Score (NPS) is a widely recognized measurement of a customer's likelihood to recommend a product or service to someone else. NPS asks respondents to provide feedback numerically, on a scale of 0 to 10, how likely they are to recommend. The instrument identifies:

**Those who are a 9 or 10 on that scale, with 10 being the most likely to recommend. These respondents are considered your Promoters.**

**Those providing a response from 7 to 8 are considered your Passives.**

**Those falling between 0 and 6 are considered Detractors.**

The NPS is calculated as the percentage of Promoters minus the percentage of Detractors. So if your survey of 100 respondents reveals 40 Promoters and 15 Detractors, your NPS is 25 (40 minus 15).

[The methodology was developed in 2003 by Fred Reichheld](#), partner at Bain & Company, who "created this new way of measuring how well an organization treats the people whose lives it affects — how well it generates relationships worthy of loyalty." It has been adopted and integrated into a great many corporate dashboards over the two decades since. And while the metric is illustrative, it is not without its limitations.

We recommend that brands measuring NPS take a careful approach to understanding who is being surveyed and when. Surveying happy customers within 10 days of a purchase is liable to return a much more favorable-looking NPS than a survey that canvasses existing and past customers within the last year, for example. This is why Martec cautions firms away from relying solely on NPS.  More on this in the closing section further below.

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# 4. Customer Churn

Plainly defined, Customer Churn is a measurement of how and when customers fall off and become ex-customers. This is sometimes referred to as "churn rate" or "attrition rate," such as the number of subscribers who cancel or don't renew a subscription over the course of a year.



**As with all of these methodologies, Customer Churn is a useful component to measuring overall CX performance, but it cannot stand alone. For one, quantitative analysis alone, which only measures the rate of churn, does not completely solve the problem or inform what needs to change in order to reverse trend.**



Customer Churn is most effective at signaling there is an issue to be addressed. But identifying that precise issue and understanding the various drivers and customers' preferred alternatives are matters of further study and analysis.

# 5. Customer Effort Score

A newer (and perhaps trendier) metric to measure the success of a customer experience is Customer Effort Score. Because technology in general has conditioned customers to expect ease and immediacy in every walk of life, brands are placing greater emphasis on understanding the effort perception of customers to identify opportunities to make various touchpoints easier, quicker or more seamless.

Typically administered in survey form using a scale of 1 to 5, or from "Extremely Difficult" to "Extremely Easy," these studies seek to understand
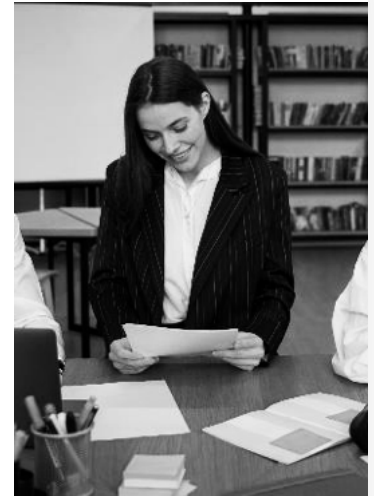
**How difficult was it to enroll in a service?**

**How difficult was it to get onboarded?**

**How difficult was it to remove an item from your cart?**

**How difficult was it for you to learn about the product or service?**

**How difficult is it to get an answer to your question?**

**How difficult is it to gain access to live customer service?**

**How difficult is it to find what you're looking for on a website?**

The objective is to make the customer exert as little effort as possible, whether purchasing or simply looking for information. Interactions should be frictionless, immediate, intuitive, and generally pleasant experiences. This is why understanding your User Experience (UX) is such an important component of customer experience… how difficult is it for the user to use the product or service?

What is particularly valuable is to look at virtually every possible experience, and measure Customer Effort in each discrete interaction. Importantly, we advise that brands segment their customers along various personas based on demographics and other considerations. Perhaps most experiences yield the desired Customer Effort Score, but one particular interaction is causing customer distress. Or, perhaps it is one specific customer segment that is having a very specific issue — based on language or comfort with technology, say — that is dragging down an otherwise acceptable score.

As with every metric we researchers rely upon, the more granular you can get when conducting your research, the more informative and actionable the insights will be.

# 6. Martec Emotion Score

Proprietary to The Martec Group, The Martec Emotion Score (MES) is a numerical representation of the emotions that are associated with a brand, product, service or experience, including the various experiences along the entire journey — from consideration and beyond the ultimate purchase.

Two key attributes of MES make it an invaluable tool in CX measurement.

- **One, it is intuitive and illustrative in that it applies a numerical value to what might otherwise be considered a difficult-to-quantify arbiter of experience: human emotions.**
- **Secondly, by its very definition, MES accounts for some of the most powerful drivers of action or inaction: again, human emotions.**

What's important to note is that emotions are complex, and they are not static for any one customer along the various journeys humans take when making purchase considerations. In fact, there are often peaks and valleys, even among those who would express overall satisfaction with an interaction with a brand. Nerves or apprehension may precede relief and excitement. Happiness may be later met with regret. And so on.

By fully understanding these various emotions experienced by various audience segments over time, a brand can take proactive measures to either reverse and neutralize negative emotions or amplify positive emotions and convert them into desired actions and outcomes.

It's been well documented that customers will recall how they felt at their emotional peaks along their unique journeys, as well as the lasting impression the experience left them with at the end (see Peak End Theory discussion in previous chapter).

# Not One or the Other,
# But Rather All

Again, the point is not to present these as a menu of metrics to choose from, but rather an overview of some of the most common relied-upon ways to measure customer satisfaction, perception and loyalty. Using all of them (as applicable and appropriate) provides a much more holistic view of the customers and prospective customers that are interacting with your brand.

By way of illustration, a customer may be generally satisfied with a given product or service on the whole but could have found a specific interaction with the brand particularly difficult (customer effort), which could cause them to explore other options going forward. To reference another example, Net Promoter Score measured in isolation can be unreliable depending on who is surveyed. In some instances, brands are looking to inflate (and report upon) their NPS numbers, so they may choose to only survey repeat customers or those who write favorable online reviews.

It is generally wise to get as granular as possible when measuring CX and UX, canvassing all audience segments and across the entire customer journey, treating each potential touchpoint as a unique experience to be measured. The objective should be to pinpoint perceptions and emotions experienced with exactitude, as opposed to looking for an "overall feel" of the entire customer population as a monolith.

Understanding the emotional connections between brand and customer is becoming more and more critical. Customer Churn, for example, is often driven by emotions in discrete interactions or touchpoints, as are perceptions relative to Customer Effort.

Identifying, examining and understanding the emotional peaks and valleys customers endure along the entire sentiment journey is key to understanding, not only how to engineer the optimal user experience, but how to apply those insights to marketing messaging, advertising and brand positioning as well. Lastly, we cannot overstate the importance of taking these temperature readings multiple times. A single snapshot is useful, but it does not speak to how the actions a brand is taking are moving the needle (positively or negatively).

Make a commitment to track these metrics over time at some predesignated cadence. Learn if the steps you're taking to optimize CX are having the desired impact. If they are, double down...if they're aren't, it's time to course-correct.

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# Case Study:
# Applying the 5-D Approach to CX

**As defined in Chapter 2, The Martec Group advocates for a "5-D" approach to optimizing the customer experience:**

1. **Discover**

2. **Diagnose**

3. **Design**

4. **Deploy**

5. **Drive**

Here is how that full-spectrum approach has been applied to inform CX decisions for Goldfish Swim School, a national franchise of premier learn-to-swim facilities for kids ages 4 months to 12 years.

# Discover

The entire project began with conversations with internal stakeholders and leadership to uncover critical CX pain points and challenges through in-depth discovery work with internal stakeholders. Before consideration was even given to how the research will be designed and deployed, the Martec team partnered with the Goldfish Swim School team to deeply understand both nuances and dynamics relative to critical CX issues, pain points, and opportunities.

# Diagnose

Upon completion of the discovery phase, Martec recommended an additional qualitative research phase to help diagnose the precise challenges and opportunities that needed to be identified and further studied. This included 25 in-depth interviews with existing Goldfish Swim School customers. This empowered the project collaborators to measure the degree of severity for critical CX issues in order to help prioritize and identify low-hanging fruit vs. time-intensive, more broad CX overhauls.

# Diagnose (continued)

Many of the methodologies explored in Chapter 2 were applied during the broader quantitative phase — the large-scale research/survey component to the project — including customer segmentation and personas, customer journey mapping, Emotion Intelligence and sentiment analysis, using advanced technology such as the Martec Emotion Score to quantify emotions at each stage of the customer journey.
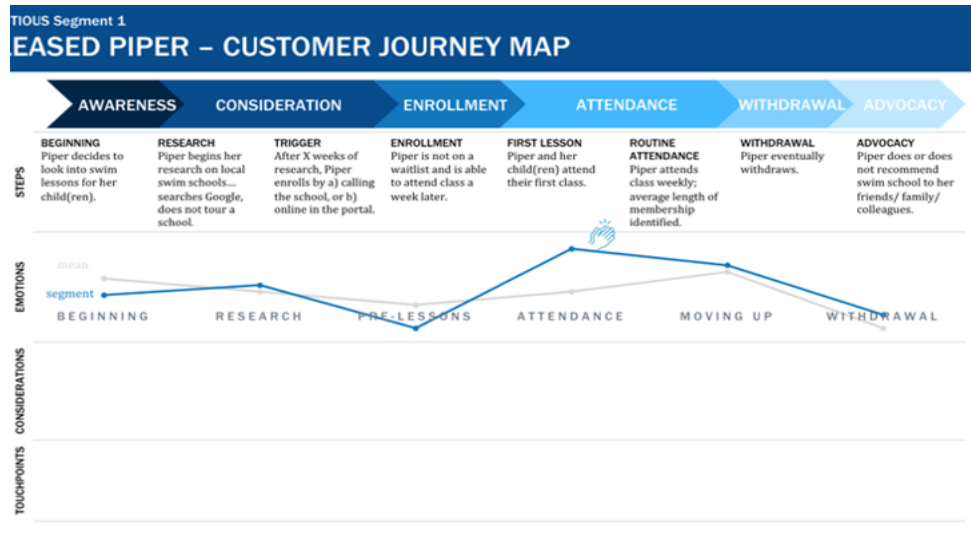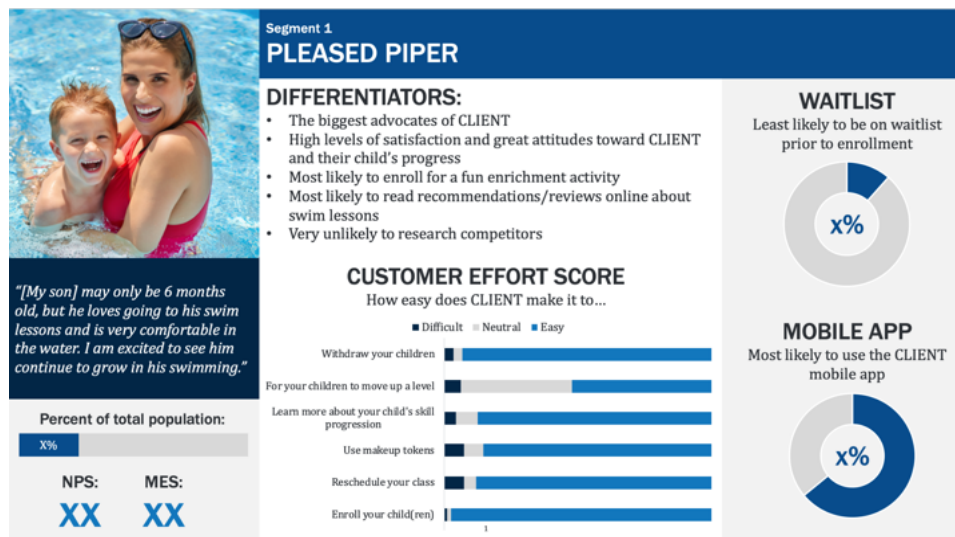
# Design

The Design phase relies on the Double-Diamond Innovation framework and design thinking to brainstorm new concepts and test various proposed solutions to see how they will be received by the target customer and other stakeholders.
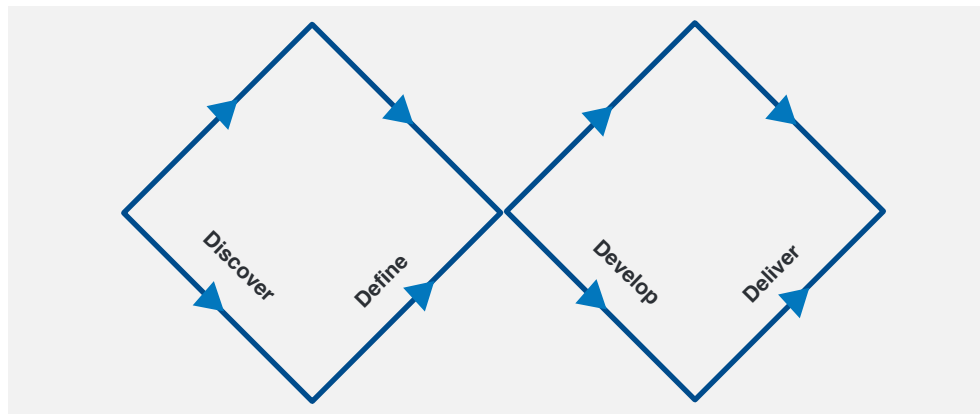


The Design phase, empowered by diligent fact finding and deep insights, is when both Martec and the client get creative to design new CX concepts and create a plan for testing these concepts.

# Deploy

With creative CX redesigns moving out of the ideation phase, Goldfish Swim School was then able to create plans to implement the new experiences based on everything gleaned, learned and analyzed in previous phases. The project team took concepts and ideas and converted them into actionable steps to take, also based on a phased approach.

To test new concepts, Goldfish Swim School started rolling out and testing these experiences with franchisees first, seeking feedback and analyzing franchise willingness to roll out specific actions to their customer base.

**Applying the aforementioned priority matrix, Martec made recommendations on what to implement and when, based on urgency, importance, and the difficulty to implement, as determined and defined earlier.**

# Drive

The fifth D in the 5-D approach is perhaps the most important…certainly the most impactful. That's when the client team has the opportunity to drive action and see outcomes. The key to making this phase successful is to monitor implementations and to track KPIs, reactions and results, positive or otherwise, then analyze the newly gathered data to determine what to continue, what to tweak, and where to potentially change course.

As the Double-Diamond Innovation framework illustrates, this data gets fed back into the 5-D machine to inform new discoveries and future iterative designs to the CX, so that the customer experience is continually being improved and optimized, even as events "on  the ground" change and evolve.

# Results

"Primary research and the voice of the customer provide invaluable information that powers our understanding, helps us anticipate their needs, and fosters meaningful connections. With real-world understanding, we are able to tailor our offers, improve our customer experience, and pave the way for growth for our brand and for our franchisees.

"Martec did a great job taking a ton of data and turning into actionable insights that will help us in many facets of the business. They were knowledgeable, easy to work with, and delivered a fantastic end product!"

— Shana Krisan, CMO, Goldfish Swim School Franchising

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# "So What" and "Now What"

## How to Apply CX Research to Attain the 10 Ideals of Optimal Customer Experiences

Once CX studies are complete, and the findings are analyzed and discussed among a brand's leadership stakeholders, the "So What?" needs to be connected to the "Now What?" In other words, the actionable intelligence gleaned should be converted into intelligent action. What should result is clarity around how the brand can reengineer its customer journey at every relevant touch point to achieve the 10 ideals of an optimal customer experience:
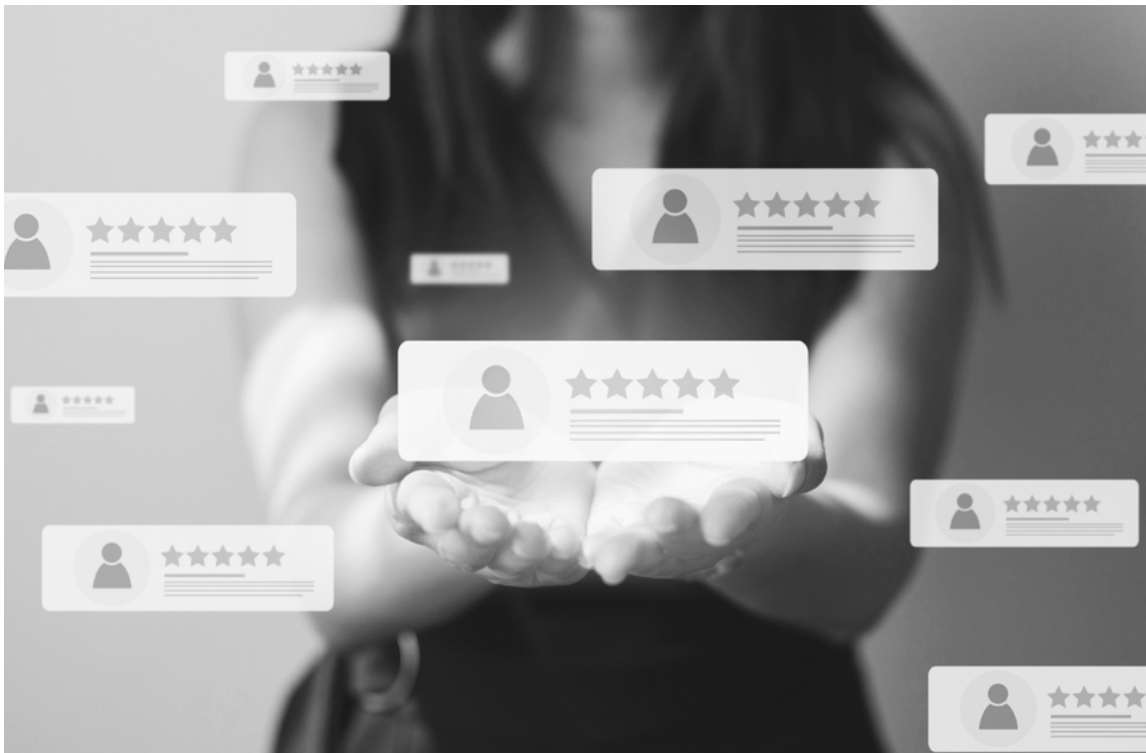
# The 10 Cornerstones of Exceptional Customer Experiences

## 👁 Transparency  ⌄

Customers want clear communication, even if the experience isn't otherwise optimal. In fact, transparency can, in some cases, serve as a preemptive protection against potentially imperfect customer experiences.

**One example might be the ability to track a UPS truck containing your delivery in real time using an app, or the step-by-step tracking of delivery pizza from the moment the order is placed until the pizza arrives at your doorstep.**

Customers want access to information and real-time tracking or pushed updates. They will increasingly expect full transparency throughout the entire customer journey or service delivery process.

# The 10 Cornerstones of Exceptional Customer Experiences

## Control

Consumers want to feel as though they are in the driver's seat during a purchase or user experience. Brands have long promised that customers are at the center of their every concern, but now more than ever, they need to deliver on that promise—literally and logistically. This encompasses the entire delivery continuum, including customization options, user personalization, and frictionless access to service assistants, either human or those powered by artificial intelligence.

Customers crave "choose your adventure"-style experiences. The more a customer feels in control of the experience, the more they feel engaged and catered to, which has become critical for customer acquisition and retention.

# The 10 Cornerstones of Exceptional Customer Experiences

## Productivity

Allow your customers to have an experience that works on their timeline—not just yours. Similar to the notion of Control described above, customers are not singular in their preferences. Many want to control the timeline and venue of the customer experience, and perhaps choose journeys that are asynchronous to the traditional model of customer service.

> **Consider how eyecare brand Warby Parker completely rethought the experience of shopping for eyeglasses and sunglasses. No longer are customers forced to visit a retail location during normal business hours and be shepherded around the store or doctor's office by retail associates or physician assistants. In Warby Parker's model, shopping, fitting, and purchasing are all performed remotely, online, and at any day or time of the week.**

Look for ways to remove the burdens of time and work from the customer experience and place more control and choice into the likely varied preferences of your entire customer base.

# The 10 Cornerstones of Exceptional Customer Experiences

## Continuity

The most critical events during a customer journey often occur at the poles—at the entry point (which we call the trigger) and upon product or service delivery. In other words, how a customer enters the journey and what happens at the end of that experience are the two events typically with the highest leverage points. How you are perceived as a first impression is critical to client or customer acquisition.

Customer satisfaction then will be judged later on the lasting impression you leave on the customer, post-purchase or -delivery. Online music equipment retailer Stillwater follows up nearly every purchase, big or small, with a personal phone call from a real human asking how the "gig" or recording session went with the new gear.

Small gestures leave meaningful, lasting impressions. Place extra emphasis on the first and final steps of each customer experience, and perhaps add unexpected, memorable moments of delight at both journey legs.

# The 10 Cornerstones of Exceptional Customer Experiences

## Recognition

Wherever appropriate and possible, create intentional milestones in the customer journey where the customer feels recognized and valued. Sometimes it is difficult to express that level of appreciation digitally, so inject some degree of human contact whenever possible.

It can be a low-cost but high-impact thing, like the aforementioned phone call, that can dramatically improve the customer experience and lead to higher retention, referrals, and repeat business. Sometimes, it's as simple as telling your customer "we value you." Customers that feel "seen" tend to have closer personal connections to a brand.

## Personalization

Customers do not like to feel like anonymous numbers to the brands they do business with. Even small gestures, like addressing a user by his or her first name upon logging in can go a long way to making the user feel as though the experience is being tailored to his or her individual needs and preferences.

Rely on your collected data to personalize the journey as much as possible and as often as you're able. "Welcome, Jane!" may become "Welcome back, Jane! We've missed you!" between an initial sign up and a return log-in, acknowledging and rewarding loyalty as the initial customer experience becomes something of a relationship.

# The 10 Cornerstones of Exceptional Customer Experiences

## Simplicity

In reference to the Customer Effort Score discussed in Chapter 3 covering common CX metrics, one way to improve CE scores is to make the experience as simple and frictionless as possible. The fewer steps, the better. The less actions required of the user, the easier it will be for customers to do business with your brand — and want to do business with you again.

Too many screens, too many potential paths to take, or too confusing of a checkout process will negatively impact your CX's perception of Customer Effort. Even if you do get a customer to convert that first time during a needlessly complex process, the likelihood of that customer returning or referring is greatly diminished.

## Intentionality

Recognize the importance of seemingly minute details and how, when added up and compounded across a multi-touch customer journey, can in total create something bigger than the sum of their individual parts.

For example, a user engaging a chat bot will typically be greeted with text powered by automation. What that initial greeting says, the tone it takes, the way it makes the user feel...all of this presents an opportunity to make a memorable first impression, as opposed to merely being transactional.

The confirmation screen or email that is generated post-purchase can be much more than a thank-you. When considered and orchestrated with intentionality, it can be designed to maximize the "End" referenced earlier in discussing "Peak-End Theory." Small details make a big difference.

# The 10 Cornerstones of Exceptional Customer Experiences

## Consistency

It is paramount, in the modern world we live and operate within, that consistency be institutionalized along the entire CX journey. In today's modern "omnichannel" media environment, it is not uncommon for customers to interact with the brand in multiple ways, timelines and modalities.

> **Think about how insurance companies must work with customers during the filing of an auto insurance claim. The journey may start using an app, so that images of the accident can be easily uploaded. The policyholder may receive a text message or email (or both) with a claim number and confirmation of receipt. There is almost always a phone call with a claims agent and/or adjustor. The customer may need to visit a website to log in for updates.**

If that user experience is not consistent across the entire spectrum, each step presents a new and unique hazard that could jeopardize the overall experience, compromise the brand /customer relationship, and ultimately become the single determining factor when that customer is presented with a policy renewal proposal.

# The 10 Cornerstones of Exceptional Customer Experiences

| | Empowerment | ⌄ |
|---|---|---|



Empowerment is the counterpart to "Control" discussed above. But Empowerment takes Control a step further and makes it more proactive and more permissive. For example, Control allows a user to receive a phone call or text message if they so choose. Empowerment proactively prompts a user with an empowering invitation: "How would you like to receive updates from us? Phone call, email, text, or all of the above?"

It's not just a choice; Empowerment is putting the user in the driver's seat and allowing that customer to also be intentional about how the customer journey will be orchestrated and traveled.

**Need help attaining these 10 ideals to optimize your brand's Customer Experience?**

Let's have a conversation about what you need to know, how we can help, and what the future looks like for your customers' ideal experiences.

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