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INSIGHT REPORT

Humanizing Digital Interactions

BEST PRACTICES FOR INFUSING EMOTION BY APPLYING *THE HUMAN CONVERSATIONAL MODEL*

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EXECUTIVE SUMMARY

Emotions play an integral role in how customers make decisions and form judgments. This means that how a customer *feels* about an interaction with a company has an enormous impact on his or her loyalty to that company. However, companies tend to ignore customer emotions, especially during digital interactions, which is problematic as customers are increasingly interacting with companies online. This report focuses on humanizing digital interactions by replicating the elements of strong human conversations. Here are some highlights:

- We developed *The Human Conversational Model*, which is made up of seven elements – Intent Decoding, Contextual Framing, Empathetic Agility, Supportive Feedback, Basic Manners, Self-Awareness, and Emotional Reflection.
- We share over 35 examples of best practices from companies that are designing digital experiences across the seven elements of *The Human Conversational Model*.
- We demonstrate how you could apply *The Human Conversational Model* to three types of digital activities: opening a new bank account online, purchasing a pair of shoes through an app, and getting technical support online.

EMOTION IN DIGITAL EXPERIENCES

A customer's experience with a company is made up of three distinct components: *success*, *effort*, and *emotion* (see Figure 1).[1] Companies have historically tended to dismiss customer emotions as too subjective, unmeasurable, and "fluffy" to warrant much attention. Continuing to neglect customer emotions, however, is a serious mistake as *emotion* is:

- **Fundamental to decision-making.** Emotions strongly influence how humans make decisions and form judgments. To lighten our cognitive burden, people naturally make most decisions using *intuitive thinking* – which is fast, automatic, and emotional – as opposed to *rational thinking* – which is slow, effortful, and logical.[2] Because people rely on *intuitive thinking* to reach conclusions, our decisions tend to be determined, not by reason, but by our current mood, our visceral states, and by the feelings each option evokes.
- **The strongest driver of loyalty.** Given the extent to which emotions influence decision-making, it shouldn't come as a surprise that how a customer *feels* about her experience with a company has the biggest impact on her loyalty to that company. When Temkin Group analyzed how each of the three CX components – *success*, *effort*, and *emotion* – affect five different loyalty behaviors, we found that an improvement in

[1] Temkin Group examines success, effort, and emotion as the foundation of its Temkin Experience Ratings. See Temkin Group Insight Report, "2017 Temkin Experience Ratings, U.S.," (2017).
[2] See Temkin Group Insight Report, "A Behavioral Guide to Customer Experience Design," (2015).

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the *emotion* component results in a larger increase in loyalty for each of the five behaviors compared to commensurate improvements in either the *success* or *effort* component (see Figure 2).[3]

- **A blind spot for companies.** Despite its significant impact on customers' decisions and loyalty, companies focus on *emotion* less frequently than they do on the other two components. We found that only 26% of large firms consider themselves "good" at measuring their customers' emotional response to interactions – less than half the percentage of companies who consider themselves good at measuring the *success* or *effort* component.[4]

Digital Interactions Need an Emotional Makeover

Although organizations tend to ignore customer emotions across the board, they are particularly guilty of neglecting them during digital experiences. Companies tend to design digital interactions to appeal to customers' reason rather than to their emotions. This increasingly poses problem for companies because:

- **Digital is the preferred channel.** Customers prefer to perform a wide variety of activities using digital channels. When we asked customers about their channel preferences for 11 different activities, we found self-service on a computer to be the preferred channel for nine of them. In addition to the popularity of computer interactions, two other digital channels – online chat and mobile usage – saw the two largest increases in customer preference between 2015 and 2016.[5]
- **Digital experiences lag behind.** When we asked large organizations to evaluate the quality of their customer experience across different channels, we found that only 29% of companies rate their digital experiences as "good" or "very good," a significantly lower percentage than for either in-person experiences (40%) or phone experiences (61%).[6]
- **...So digital will become the loyalty backbone.** As more customers interact with companies more frequently over digital channels, these interactions will become the foundation of their relationships with these firms. If organizations are unable to make an emotional connection online, then they risk diminishing customer loyalty.

INTRODUCING *THE HUMAN CONVERSATIONAL MODEL*

While customer loyalty increasingly depends on a company's ability to design emotionally engaging digital interactions, most organizations are not currently on course to deliver such experiences. How can they get on the right track? By not just designing digital interfaces, but by creating compelling conversations.

Human beings are inherently social. Consequently, conversations are not merely functional; they are emotionally stimulating as well. In fact, the interplay between two conversational

[3] See Temkin Group Insight Report, "ROI of Customer Experience, 2016," (2016).
[4] See Temkin Group Insight Report, "The State of CX Metrics, 2016," (2016).
[5] See Temkin Group Data Snapshot, "Channel Preferences Benchmark, 2016," (2016).
[6] See Temkin Group Insight Report, "The State of CX Management," (2016).

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partners is so deeply rooted in who we are as human beings, our brain believes we are participating in a human-to-human interaction even when we're interacting with an inanimate object, like a computer or mobile phone.

To identify what makes for an emotionally stimulating conversation, we dissected the key elements of human-to-human interactions and developed what Temkin Group calls *The Human Conversational Model* (See Figure 3). A gratifying conversation requires two processes:

- **Cooperative Interface.** Each participant is required to collaborate with her partner to achieve the shared goal of the conversation – be that casually catching up, gathering information, sharing knowledge, etc. This is the part of the model that a conversational partner sees and responds to, and it consists of five elements: *contextual framing, intent decoding, empathetic agility, supportive feedback,* and *basic manners*.
- **Background Mindfulness.** This portion of the model is not observable within what would normally be considered the scope of the conservation as it pertains to what happens internally within person. Each participant has a pre-existing notion of who he is as an individual (*self-awareness*) and throughout the course of the conversation, learns about how he affects other people (*emotional reflection*). Though not directly observable, "background mindfulness" informs the way in which each participant communicates with his current and future partners.

The Seven Elements of *The Human Conversational Model*

Here are the "Cooperative Interface" elements of *The Human Conversational Model*:

1. **Intent Decoding.** People have conversations for all sorts of reasons – to get to know someone better, to bond over shared interests, to obtain knowledge on a certain topic, to convey information, and so on. A good conversationalist is able to detect what his partner hopes to achieve during the conversation. It would not be appropriate, for example, for a participant to start grilling his partner about her political beliefs when she is just looking to tell someone about her new promotion at work. Neither would it be appropriate for him to start giving a work colleague a detailed description of his latest doctor's visit during a business meeting. Early on in the conversation, participants should be able to detect what the other one is hoping to achieve based on the context, the content, the tone, and their shared history.
2. **Contextual Framing.** A good conversationalist is able to quickly size up her partner, taking stock of his appearance, age, gender, style, and comportment, remembering whether they have interacted previously, and if they have, how it went. If two people who have met before strike up a conversation and one of them acts like a complete stranger, the other will be hurt and offended. Likewise, if one participant speaks to her partner as though he is a child, even though he is a grown man, he will be deeply insulted. When it comes to conversations, one size does not fit all. A good conversationalist must be able to quickly deduce some basic characteristics of her partner and then tailor the conversation accordingly.
3. **Empathetic Agility.** Humans are naturally skilled at interpreting both verbal and nonverbal cues from other people. A good conversationalist doesn't only pay attention to what his partner says during the course of the conversation – although that is

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obviously important – he also picks up on her mood, tone, body language, facial expressions, and so forth. And he shouldn't just passively monitor these cues. When he recognizes these signals, he should alter his behavior in ways that will keep the conversation positive and productive. So if his partner begins showing signs of feeling irritated – crossing her arms, speaking tersely, pursing lips, etc. – he might change tactics and speak soothingly, smile, and show he's listening to her concerns to defuse her annoyance.

4. **Supportive Feedback.** A good conversation does not consist of one person monologuing while the other stares at her, stony faced. Instead, conversation should be a give and take between partners. While one person is speaking, the other keeps up a steady stream of feedback to let her know – without disrupting the flow – how her message is being received. The listener might nod his head, murmur "uh-huh" or "mmhm" in encouragement, or generally look interested.[7] Such signals convey to the speaker that she is sharing information considered common ground and that the listener is actively participating in the conversation. The listener can also let the speaker know that they are on the same page by asking relevant questions, expressing suitable emotions, and contributing germane information when the speaker is finished talking.
5. **Basic Manners.** At the core of any productive, engaging conversation are good manners and an adherence to social norms. A conversation is a cooperative endeavor, and the fundamental principles of human interaction need to be followed or the conversation will end up being difficult and counterproductive. Even if all the other elements of a conversation are observed, if basic etiquette is ignored, the conversation will not be a success. So, for example, a good conversation requires that participants speak audibly (but not shout), that they take turns talking, do not blurt out non-sequiturs, do not become too long-winded, and that they don't simply wander away mid-way through.

Here are the "Background Mindfulness" elements:

6. **Self-Awareness.** One might think that a good conversation begins when two people start a dialogue, but in fact, the groundwork is laid before a single word or look is exchanged. Engaging, productive conversations are predicated on each participant being *self-aware*. Each must arrive with a clear understanding of who he is as a person, of his own personality, feelings, motivations, needs, desires, beliefs, strengths, and weaknesses. Without the anchor of this *self-awareness*, he is likely to conduct himself erratically, promise things he cannot fulfill, espouse incompatible beliefs, radically change his tone, and behave in ways that otherwise bewilder and worry his conversational partner. Instead, each participant should enter into the conversation with a firm grasp on who he is, what he hopes to achieve, and what he is and is not capable of.
7. **Emotional Reflection.** Over the course of a good conversation, a participant will continuously learn more and more about her partner, enabling her to steadily refine the ways in which she communicates with him. All this knowledge should not be

[7] Kvittingen, I. (April 22, 2014). "Mhm" and other sounds that help in conversations. ScienceNordic. Retrieved from http://sciencenordic.com/mhm-and-other-sounds-help-conversations

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forgotten once the conversation ends. Each participant should not only remember the best ways to communicate with that particular partner, but should also apply what they learned in that conversation to future conversations with other partners. For example, during a conversation, someone might learn to better discern indicators of disinterest (eyes wandering, monosyllabic replies, checking a phone), or how to respond to a partner with a particularly dry sense of humor, or the best way to disagree respectfully. By spending some time after the interaction thinking about where the conversation flowed smoothly and where it stalled, a person is able to enjoy a more engaging and productive conversation with that partner – and other partners – in the future.

APPLYING *THE HUMAN CONVERSATIONAL MODEL* TO DIGITAL INTERACTIONS

Because conversation is so ingrained in human nature, people unconsciously expect the same level of cooperation and communication in non-human partners as we do in our human partners, and when we don't receive it, we experience the same negative emotions as we do when a human partner let us down. Unfortunately, however, most companies still design digital channels in way that doesn't engage customers' natural drive to socially and emotionally connect. To overcome the innate coldness of digital channels, companies should apply *The Human Conversational Model* to their digital customer experience design efforts (see Figure 4):[8]

1. **Intent Decoding.** Anticipate what digital customers want to achieve.
2. **Contextual Framing.** Personalize digital experiences for individual customers.
3. **Empathetic Agility.** Observe and respond to digital customers' emotions.
4. **Supportive Feedback.** Let digital customers know they are on the right track.
5. **Basic Manners.** Follow social norms and good design principles.
6. **Self-Awareness.** Design digital experiences that embody your brand.
7. **Emotional Reflection.** Apply digital learnings to future interactions.

#1 Intent Decoding: Anticipate What Digital Customers Want to Achieve

Customers do not always arrive at a digital interaction with the same path or goal in mind, so treating them all the same makes for a cold reception. Instead, companies should make a reasonable assumption about what a particular customer wants to do during a particular interaction. By predicting customers' desires, companies can make it easier and quicker for customers to accomplish their goals. To demonstrate *intent decoding*, companies should:

- **Recognize patterns.** Human behavior frequently follows predictable patterns, making it easy to guess with some certainty what someone will do in the future. A company can therefore anticipate an individual customers' intentions by combining

[8] For this report, we spoke with several companies about how they design digital experiences. Companies interviewed for this report include 24/7, Adaptive Path, AESTrue, American Specialty Health, BloomBoard, BroadSoft, Clicktale, Confirmit, Continuum, Financial Engines, HomeAdvisor, Ipsos, Man Made Music, Modus Associates, Moven, Qualtrics, Regions Bank, TELUS, USAA, and Walgreens.

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all the data it's collected on her – such as purchase/usage history, renewal patterns, previous interactions, feedback history, and so on – and using it to identify behavioral patterns. Once it's recognized these patterns, it can proactively address the customer's wants and needs. For example, HomeAdvisor offers customers routine maintenance, and if a customer puts in a service request to, say, get her furnace check out, one year later HomeAdvisor will proactively send her an email asking whether she is interested in having her furnace checked again. A wireless company, meanwhile, might realize that a customer pays her monthly bill online on the last Sunday of every month, so if the site is experiencing issues that day, it could preemptively send her an email letting her know what the problem is and when it will be resolved.

- **Make educated guesses.** Companies will never be able to predict what every customer wants to do during every interaction, but they should be able to look at the circumstances around an interaction and make an educated guess about what most customers are looking to do most of the time. For example, USAA knows the enlistment data of all its active duty members, which means it has a fairly clear idea of when a member will be leaving the military. Most members leave the military at around the four to six-year mark, then another chunk leave around 12 years, and of those who stay past 12 years, most land up staying active for longer than 20 years. So while its knowledge isn't perfect, USAA uses this information to make informed predictions about members' needs. When it seems that a member has been enlisted for close to four years, it knows that they are most likely starting to think about leaving active duty, and therefore proactively reaches out to begin prepping him for his transition into the civilian world. It does the same at around 12 years and 20 years. When USAA reaches out to its members who are likely transitioning from active duty to veterans, it directs them to a number of online tools designed to help make their transition as smooth as possible, such as budget assessments, employment tools, a separation checklist, guides to leaving the military, and much more.
- **Remember past interactions.** To help customers more quickly and efficiently reach their goals, companies should make a user's earlier choices and preferences the default, should autofill wherever possible, and should present content that's relevant to a customer's demonstrated interests. Amazon.com has dedicated almost all the real estate on its home screen to showing customers products based on their past browsing or purchase history, making it easier for them to find and purchase desired items (see Figure 5). And when a customer goes to buy something, Amazon.com offers him the option to "Buy now with 1-click," which uses his default payment and shipping information so he doesn't need to fill out the same forms with the same information every time he makes a purchase. And while Amazon.com does use defaults, it also stores previously used addresses and credit card information so customers can easily switch between different options.
- **Follow the 80/20 Rule.** Customers expect to reach their goal quickly and efficiently during digital interactions; however, prominently displaying every potential option leads to a cluttered and confusing website or app. To make the path to success efficient for most customers most of the time, companies should design their digital experiences using the 80/20 Rule. In this case that means that customers will want only 20% of the functionality and features 80% of the time. Companies can identify the 20% most-used features through cookies, web analytics statistics, and form submissions and can then prioritize and optimize those functions. When Tate Art

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Galleries redesigned its digital experience last year, it narrowed the navigation section options from 11 items down to only three items – Art & Artists, Exhibitions & Events, and Plan Your Visit – based on what it found most visitors to the website wanted to do.[9] It also displayed popular search filters more prominently to the top of its page and removed the unpopular search filters altogether to further reduce clutter while still being helpful.

- **Ask questions.** A company does not always need to rely on data it's previously collected to predict a customers' intent – sometimes it can just ask the customer directly and, based on her answers, can narrow down the range of options it presents, helping the customer reach her goal more directly and efficiently. For example, The North Face has paired with IBM Watson to help customers find their perfect jacket.[10] When customers arrive at the site, they are greeted with a message saying, "Hi! Can I help you shop for a jacket today?" and if they click, "Let's start," it kicks off a series of questions about where exactly the customers plan on wearing the jacket, when they plan on wearing it, and what specific characteristics they'd like in the jacket (see Figure 6). The North Face uses Watson's natural language processing capabilities to understand customers' answers to its questions, and then it presents and refines products based on these answers. By asking customers questions about what they are looking for, The North Face helps them find the right products quickly and conveniently.

#2 Contextual Framing: Personalize Digital Experiences for Individual Customers

While digital interactions may seem impersonal, they actually provide an enormous amount of data that companies can (and should) use to paint a more complete portrait of who each customer is as an individual. Once a company has this context around a customer, it can then tailor the way it communicates and interacts with a customer to suit his personal needs and desires. Here are some ways companies can practice *contextual framing*:

- **Group together like-minded customers.** Effective personalization requires companies to group customers together according to similar mindsets, behaviors, and needs and then tweaking interactions to make them more relevant and engaging for each group. So, for example, all customers who visit HomeAdvisor's website are looking to be matched with a suitable contractor, however, the journey they take to get there varies depending on which of two segments they fall into (see Figure 7). One segment of customers arrives on the site looking to either remodel or renovate their home, which means they feel excited and optimistic. The other segment arrives on the site because of some home emergency, like a flooded basement or broken dishwasher, and is thus feeling anxious and stressed. HomeAdvisor capitalizes on the excitement of the first segment by making the home-improvement portion of the website photo-rich and inspirational – a place where customers can gather ideas. When it comes to the second segment, HomeAdvisor focuses on getting them in touch with a professional as quickly and painlessly as possible. So, for example, it eases their stress by offering a service called "Instant Connect," where HomeAdvisor finds these

[9] Retrieved from http://www.tate.org.uk/welcome-new-tate-website
[10] Retrieved from https://www.thenorthface.com/xps

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customers a contractor who can call the customer to set up an appointment immediately, instead of potentially wasting time playing phone tag.

- **Customize content.** Companies should be gathering, tracking, and managing a variety of customer data – such as purchase history, support interactions, demographic information, location information, social media interactions, purchase or renewal patterns, feedback history, etc. – to get a granular view of each customer. Companies then need to use these insights to create a personalized digital experience for each individual. As one of the largest Telco companies in Canada, TELUS' customers defy any single grouping; they span different locations, ages, expertise levels, life stages, and so on. To avoid creating a one-size-fits-all digital experience, TELUS' digital experience design efforts are guided by the mantra, "Show me you know me," which refers to its customers' desire for the company know who they are as individuals. To do this, TELUS collects data on which services customers use, which problems they've experienced, how many times they've called the company, what life stage they are in, where they live, what mindset they have, and so on, and then it presents each customer with relevant information, offers, and messages during their digital interactions. American Specialty Health, meanwhile, tailors each customer's digital experience by displaying images of people who are similar to him. So, for example, if a customer is using an ASH app that allows him to check into a health club, the app's images will depict natural-looking people who are in the midst of working out.
- **Create an onboarding process.** Companies should think of their onboarding process as akin to meeting someone for the first time. They should be welcoming, charming, and attentive without bombarding the newcomer with information. Onboarding is an opportunity for a company to gather nuanced personal information from customers that it could never glean from data alone, thus allowing it to more effectively personalize future interactions. Regions Bank, for example, offers new customers a "Help Me Decide" tool, which helps customers find the Regions product best suited to their needs based on their answers to a number of questions. Not only does this tool help Regions get a clearer picture of who exactly a customer is, but with nearly 250,000 possible ways to go through the questions, the resulting product suggestions are customized for each individual. The personalized nature of the product recommendations means that customers feel more competent and confident in their decisions. In fact, Regions has found that customers who complete this guide are four times more likely to preserve and complete the application process.
- **Modulate tone.** Like humans, each company should have a distinct tone of voice, but should adapt it to suit the tenor of a particular moment or interaction based on context. In the same way that a person might modulate her tone depending on whether she is conversing with a friend at a bar or a friend at a wake, a company should also adjust the exact tone it strikes depending on the customer, the interaction, and the touchpoint. For example, during consumer banking interactions, Regions Bank communicates in an informal, friendly tone of voice. It also shows more visual images and uses lighter colors. However, during its more premier wealth management interactions it adopts a more formal tone, shows less visual imagery, and uses darker colors (see Figure 8). To ensure that it strikes the right tone during these different digital interactions, Regions provides the staff members who write content for the site with a tone of voice style guide.

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- **Look at the wider journey.** The line between digital experiences and in-person or phone experiences are becoming increasingly blurred. In order to properly understand the context surrounding a digital interaction, companies need to think about how it sits within the customer's wider experience and then design accordingly. Macy's recognizes that customers frequently check out its website or app to compare prices, check reviews, look up inventory, and so on while they are in actually inside the store. So to improve the customers' overall experience, Macy's added beacon technology to its mobile app. Now when a customer enters a store, the app's home screen automatically shows a price comparison calculator, updated store inventory, and product reviews. Macy's took the merging of its in-store and digital experiences even further on Black Friday weekend last year when it created a beacon-driven gaming campaign. As customers with the Macy's app entered the store, they received a push notification inviting them to participate in its *Walk and Win* campaign, a digital scratch-off game that gave away thousands of prizes, from gift card to celebrity meet-and-greets.[11]
- **Integrate with other technologies.** In addition to computers, tablets, and mobile devices, companies should consider how to deliver experiences through technologies like Voice and Gesture, the Internet of Things, Wearables, and Augmented and Virtual Reality. For example, American Specialty Health's mission is to "empower individuals to live healthier and longer" and "to bend the healthcare cost curve for [its] customers." To help ASH achieve this, it aggregates data from over 150 different connected devices and apps about customers' activity, such as steps, sleep, heart rate, blood pressure, weight, prescriptions, and so on. Customers opt into ASH's Connected!™ program, which collects all this ambient data and uses it to personalize each customer's experience. For instance, ASH has set up Health Challenges that customers can participate in, which means if they do something healthy like, say, reach a certain number of steps, they earn a reduction in their health insurance costs. ASH also passes this data on to customers' health coaches, which allows coaches to better target problem areas and spot potential problems before they start.

#3: Empathetic Agility: Observe and Respond to Digital Customers' Emotions

Employees can usually detect when a customer is becoming frustrated or confused, allowing them to change tactics mid-conversation to improve the customer's experience. However, digital experiences don't have a human mediator. Instead, companies need to both recognize which emotions customers are likely to be feeling at each touchpoint and "observe" individual's experiences in real time. Once companies combine this generic understanding of customers' emotional journeys with specific data about individuals' behaviors, they can then design digital channels that are more responsive to customers' changing emotional states. To show *empathetic agility*, companies can:

- **Use virtual agents.** Companies should be monitoring customers' digital body language and when they recognize behaviors that indicate frustration or confusion, such as sitting on a page, backtracking, scrolling repeatedly, refilling out forms, abandoning a shopping cart, etc., they should send these struggling visitors an

[11] Jaekel, B. (March 25, 2016). How Macy's maximized in-store traffic with beacons during Black Friday. RetailDIVE. Retrieved from http://www.mobilecommercedaily.com/how-macys-maximized-in-store-traffic-through-beacons-during-black-friday

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unobtrusive chat invitation. Such timely interventions mitigate negative emotions by providing specific, personalized help delivered through a live agent or chatbot. To be successful, the agents or chatbots who field the chat sessions should have the tools at their disposable to solve customer problems, should be well-versed in the brand's tone of voice, should stay on point, should have the communication skills not to make grammatical errors, and should personalize their responses to a customer as much as possible. Hilton sends struggling visitors a chat invitation offering to help them "Plan the perfect stay with us" (see Figure 9). If the customer clicks on "Chat now," he is connected to an agent who can help him in real time. To ensure that customers have a consistently positive chat experience, Hilton goes through the transcripts of these chat conversations and trains its agents to use a direct, brief, and friendly tone of voice, which makes the customers feel comfortable while helping them achieve their goals as efficiently as possible.

- **Introduce an AI concierge.** Companies can use AI technologies to add conversational interfaces to previously static self-service content, offering customers personalized, real-time, and human-esqe digital experiences without needing to involve employees. 1-800-Flowers has a digital concierge – dubbed Gwyn (Gifts When You Need) that uses IBM's Watson to help customers find products. When customers arrive at the web or mobile site, Gwyn engages them in conversation using a WhatsApp-like messaging platform and asks them questions about what they are looking for, shows them results, and then enables them to select and order products from inside the conversational interface. So, for example, if a customer tells "her" that he is looking for a birthday gift, Gwyn will ask a series of qualifying question – about age, gender, occasion, etc. – and then suggest appropriate product offerings. Because of Gwyn's underlying cognitive capabilities, she learns more about customer needs the more she interacts with them, allowing her to offer a personalized shopping experience for each customer based on his previous behavior. So far 1-800-Flowers has found that the average visitor asks GWYN five to six questions, spending about two minutes interacting with her.[12]
- **Send exit-intent pop-ups.** The most effective employees can read customers' emotions and body language, make inferences about their emotional state, and then interact with them in ways that improve the experience. Such emotionally savvy employees can stop unhappy customers from leaving the company, can turn detractors to passives or promoters, can humanize the company, and so much else. Unfortunately, digital interactions inherently lack employees who can recognize when customers are having a bad experience and respond accordingly. However, companies can still look for *digital body language* cues that indicate confusion or frustration and then intervene to stop the customer from churning (see Figure 10). For example, some companies use exit-intent pop-ups to predict when a customer is about to leave their site so they can intercept them and improve their experience. Successful exit-intent pop-ups don't interfere with customer browsing; instead, they offer companies the opportunity to collect information, sweeten the deal, or just show customers they care about them. When visitors on Virgin Atlantic's website move to exit in the middle of a booking, a pop-up appears asked them if they'd like a reminder of their flight search emailed to them (see Figure 11). Likewise, MusicMagpie sends

[12] Caffyn, G. (February 20, 2017). What 1-800-Flowers has learned from its Watson-powered concierge. Digiday. Retrieved from https://digiday.com/uk/1-800-flowers-learned-watson-powered-concierge/

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users who appear to be exiting a pop-up window asking for feedback about why they are leaving, which provides the company with useful insights into how it can improve future experiences.

- **Make it easy to reach a human.** Customers may want to reach a human representative for any number of reasons, and making it difficult for them to locate concrete contact information will leave them feeling frustrated and trapped. Instead, companies should design digital interactions so that customers always know where to turn to for help. One of TELUS' design mantras is "no dead ends," which means that if a customer reaches the bottom a page and is still confused, TELUS gives her clear options for where she can go for help next. It not only sends a chat invitation to customers who look stuck in the process, but it also has links to its "Contact Us" page in the footer of every single page. TELUS' "Contact Us" page provides customers with numerous options for how they can reach a person to resolve their issue, such as live chat, Twitter Support, brick-and-mortar store, email, and telephone numbers (see Figure 12). Vodafone's Digital Engagement Center has deep integration with its mobile app, which means that when customers click the button to call or chat with an agent, the agent's desktop immediately shows that customer's activity across all channels. Additionally, the button to connect an agent is dynamic, so if the company is expecting high call volumes, the call button can be hidden from all but the highest value customers while other customers are routed through more appropriate contact channels.[13]
- **Use videos.** Optional videos offer a dynamic and engaging way to change potentially negative digital experiences into emotionally resonant experiences. First of all, they allow companies to alter the tone of an interaction, making it more interactive and human, without actually needing an employee to intercede. Second of all, videos can convey complicated information in an easily digestible format that doesn't take up too much space on a page. Companies can thus use short video explanations to clarify potentially confusing parts of the digital experience. Safelite Autoglass, for example, supplements some of its written explanations with videos of technicians providing a more detailed explanation of the text. These videos – which cover topics like how customers pay, how the warranty and guarantee work, what customers can expect, and so on – not only offer more in-depth and dynamic explanations than the written text, but they also add a human element to the digital interaction by introducing viewers to real Safelite technicians.
- **Elicit different feelings at different times.** When customers interact with a company, the feelings they experience are more complex and nuanced than simply "positive" or "negative." In person, an employee would be able to differentiate between excitement, relaxation, pride, joy, etc., but it is impossible to detect and respond to those feelings during digital interactions. However, companies can make intelligent inferences about which feelings customers' generally want and expect to experience at different touchpoints. For example, when customers first arrive on a website, they may want to feel optimistic that they will accomplish their goal or intrigued about what the company can offer them, but when they are filling out their personal information, they probably want to feel secure and trusting. So the beginning

[13] Retrieved from http://www.genesys.com/resources/success-stories/Vodaphone_Germany-Case_Study-EN.pdf

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of the interaction might be full of images and excited language, while the payment section may forgo any pictures and adopt a more serious tone of voice.

#4: Supportive Feedback: Let Digital Customers Know They Are on the Right Track

Digital interactions can be rife with uncertainty. Not only are customers frequently asked to send important personal information out into the ether, but they can also find it hard to find help for the specific obstacles they encounter along their journey. To lessen uncertainty and assuage anxiety, companies should continuously communicate to customers that they are on the correct path to success. To give *supportive feedback*, companies can:

- **Adjust communication style.** Like in any conversation, customers over digital channels want regular feedback from their partner about how the interaction (and their overall relationship) is going. Due to the nature of digital channels, this feedback should be short, relevant, unobtrusive, and friendly. Moven's objective is to help its customers better understand and manage their spending, which requires it to provide frequent, informative feedback to customers. However, as customers usually only open the Moven app briefly to check their bank balance, the company only has a narrow window of time through which it can communicate with them. Moven therefore designed its app so that when customers open it, they immediately see red, green, or yellow, depending on whether they are spending more, less, or the same amount of money as usual (see Figure 13). Moven also helps keep customers on track by adding encouraging messages under their bank balance, such as "Nice work! You're spending below typical. Keep it up," or "You're nicely on track to save some money this month." By adjusting its communication style to suit the short interaction time, Moven is able to quickly and intuitively offer feedback about customers' spending habits.
- **Use functional sounds.** Companies can strategically deploy functional sounds during a digital interaction to provide customers with immediate, intuitive feedback. Because functional sounds are responsive to customers' actions – instantly and subtly letting them know whether or not an effort has succeeded – they make an interaction feel more like a conversation. Sounds not only provide useful feedback, but they also instinctively resonate with customers' emotions. For example, if a customer is video chatting with a doctor and needs to send important, private medical information, a solid "kerthunk" noise intuitively instills confidence in the customer that her file has successfully reached the doctor (and the doctor alone) than, say, a lighter "swoosh" noise. The questioning "dun-dun" noise a customer hears when his TV cannot find the show he was searching for displays a friendly personality while alerting the customer that something has gone wrong.
- **Update customers on their progress.** Companies should use progress trackers to minimize customer uncertainty and frustration during digital interactions. Effective progress trackers help customers locate themselves on the path to task completion by showing them what they have accomplished so far, which step they are on, and how many more steps they have until they reach their goal. Keeping people informed about where they are in the process has been shown to significantly reduce abandonment rates. Progress trackers can be used in any digital interaction that includes a multi-step process, like ordering online, signing up for a new service, or booking a vacation. When new customers go to set up a personal account at TELUS, the top of the screen displays the five steps they will go through: Create profile, Select service, Get

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verification code, Enter code, and Done. The nodes for each step change from grey to green as the customer works his way through the process, letting him know which step is on and which steps he can expect ahead.

- **Use loading animation to indicate delays.** As soon as a customer initiates an action – such as clicking a link or tapping the screen – she expects an immediate response from the system, and if she doesn't receive it, she will become anxious that the experience is not working properly. If a digital experience needs time to load, minimize customer stress by giving visual feedback that their request has been received and is processing. While companies can give this visual feedback in the form of a loading bar or a spinning wheel, this is a good opportunity to inject some organizational personality and delight the customer. Safelite Autoglass, for instance, lets customers know that a page is loading by showing cartoon windshield wipers pumping back and forth, flicking rain off a windshield. And after customers finish answering HomeAdvisor's questions, it takes a few moments for the site to put together a list of suitable contractors in the area. During these few moments, HomeAdvisor lets customers know exactly what it is working on behind the scenes by showing customers a loading screen with the five steps it's moving through – Matching coverage area, Service Type, Checking availability, Profiles & reviews, and Local cost data – with accompanying animations that turn from grey to color as the step is completed (see Figure 14).
- **Provide clear next steps.** The path a customer should take to accomplish his goal is not always as obvious during a digital interaction as it is over the phone or in a store. Once a customer does something – like finish creating an account, complete a purchase, or run into a 404-error page – she may not know where to go next to continue her journey. Companies should therefore always provide explicit instructions for next steps. When a customer completes a purchase for a book on Amazon.com, the thank-you page gives her options to begin reading a digital copy of the book immediately, to review or edit her order, or to continue shopping. And after a customer makes an online purchase at Birchbox, the retailer sends an email that lets her know that that her order has been received, reiterates important information like purchase summary and shipping address, and provides contact information if the customer has questions. For customers who would like to continue interacting with Birchbox, the email contains personalized product recommendations, links back to the website, a place to download its app, and social media links. Birchbox also clearly explains what the customer can expect from the rest of the purchase process, with prominent text saying, "We've processed your payment and will ship your full-size order within 1 business day. We'll email you as soon as it's on its way."
- **Use microcopy.** Microcopy refers to the small bits of text that give customers instructions during an online or in-app experience. It includes things like error messages, hints, and short explanations. Through microcopy, companies can subtly guide customers, letting them know if they are on the right path and redirecting them if they are not – all without causing too much disruption to the customer's experience. It also proactively answers users' questions, such as, "what will you use my email for?" or "what went wrong?" thereby alleviating customer anxiety and making the interaction feel more like a conversation. Good microcopy should be short, informative, and in keeping with a company's personality. For example, MailChimp's signup page uses microcopy to help potential customers fill out the form correctly

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(see Figure 15). The microcopy lets the customer know that his username can be either an email address or a combination of letters and numbers. It also lists password requirements. As the customer fulfills one of these requirements, the microcopy turns from black to grey, subtly letting him know which ones he still needs to complete.

#5: Basic Manners: Follow Social Norms and Good Design Principles

To make digital experiences enjoyable and productive for customers, companies should design their sites and apps to behave like a charming, polite, and helpful employee, staying away from behaviors that most people would find annoying. To display *basic manners* during a digital interaction, companies can:

- **Fade into the background.** In the same way that humans tend not to like interacting with people who are hyper energetic and fussy, customers don't appreciate overbearing digital experiences. To avoid making customers feel crowded and bothered, provide them with a well-balanced amount of meaningful information, removing all unnecessary buttons and instructions. TELUS avoids bombarding customers with inessential information by using mobile-first design for all digital interactions. By designing for mobile first, TELUS is able to preserve the elements of its brand that distinguish it from competitors, while eliminating extraneous information and details. Its website therefore uses a lot of white space and videos, shows clear calls to action, has short and simple steps, and uses clear images.
- **Tap into existing mental models.** When customers arrive at a digital interaction, they anticipate a specific sequence of events, they expect things to be located in particular places, and they assume that certain symbols correspond to certain actions. So, for example, people expect to see the login/signup information, the search bar, the menu, and the site's title all at the top of a page inside a banner. They also expect the magnifying glass to designate a search bar, blue text to indicate a clickable link, and forms to begin by asking for their first name. Violating these assumptions will unnecessarily disorient and frustrate customers. So to make digital experiences intuitively easy for customers to navigate, companies should design online and mobile interactions in a way that fits with customers' existing mental models. The account sign-up page on Walgreens' mobile site does this well (see Figure 16). For example, the menu bar is located in the upper left corner in its common hamburger shape. The blue banner at the top of the page also contains the Walgreens logo, which takes customers back to the home screen when clicked, a magnifying glass for searching the site, and a shopping cart. When text is a clickable link – like for "Sign in," "Password requirements," and "Walgreens Terms of Use," – Walgreens makes the words blue. It also provides helpful tips in the form of a clickable question mark next to some potentially confusing parts of the form.
- **Demonstrate trustworthiness.** Customers often need to enter a significant amount of personal information – their name, email, credit card number, date of birth, etc. – in order to complete a digital interaction. Giving companies this private information takes a certain level of trust on the part of the customer, especially during digital interactions when all this information just disappears into the ether. To make a trustworthy impression, websites and apps need to be aesthetically pleasing, functional, consistent, and forthcoming with information. For example, Financial Engines helps customers save for retirement, and to do this effectively, it needs a lot

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of private information from customers, including their name, age, salary, future plans, savings in their 401(k), and so on. To show potential customers that it is trustworthy, Financial Engines begins by making it clear that its service is offered through their employer to help them save for retirement. And it makes sure to start the relationship off on the right foot by explicitly designing its digital interactions to give customers a positive experience within the first three minutes of the experience. It then incrementally increases trust by demonstrating to customers that it is only using their financial information to improve their lives. For example, it sends them personalized messages like, "You increased your savings rate! Here's the next step we suggest." By quickly helping customers feel that they are accomplishing something – and that they've got an expert by their side helping them – and then clearly laying out the next steps, Financial Engines is able to build up customer trust and reassure customers that it will use their private financial information only to help them.

- **Don't interrupt.** In the same way that polite conversational participants let their partner finish before jumping in, polite websites and apps do not interrupt the customer's flow by sending unsolicited pop-ups, welcome gates, or auto-play videos clips that hijack the customer's attention away from what they wanted to be doing. It's akin to a television suddenly changing the channel – the customer is forced into action in order to return to what they wanted to be looking at originally. Companies can politely ask for feedback, offer help, or advertise their products or services by presenting options along the side or bottom of the screen. For example, instead of interrupting customers' journeys with a pop-up window asking for feedback, TELUS has a bar at the bottom of every screen asking customers, "What do you think of our website?" with a "Leave feedback" button right next to it (see Figure 17). And instead of using a pop-up, The Guardian's website asks customers to make a contribution through a bar at the bottom of its home screen. ProBlogger, meanwhile, has uses a top sticky subscribe bar to encourage visitors to sign up for its email list, and when it added this call to action, its subscriber number actually increased by 25%.
- **Make information easily digestible.** People do not enjoy conversations where communication is unnecessary difficult, such as partners who use unfamiliar words, mumble, don't speak the same language, or who go on tangents. Likewise, customers are not going to enjoy interacting with website or mobile apps that communicate information in a needlessly complicated manner. To create digestible digital experiences, text should be reasonably sized and easy to read, there should be high-levels of color contrast for text, language should be clear and succinct, lines should not span too far across the page, similar elements should be grouped by color, and there should be plenty of white space for breathing room. For example, USAA uses easy-to-read, high contrast text, either blue or black on white or white on dark blue, makes grouping very clear, uses an eye-catching color (green) for calls to action, and uses short blocks of text rather than long lines (see Figure 18). It also describes its products using simple language that the customer can understand rather than company jargon.

#6: Self-Awareness: Design Digital Experiences That Embody Your Brand

Before a company can emotionally connect to customers over its digital channels, it needs a crystal-clear understanding of who exactly it is as an organization. Unlike in-person or over-the-phone interactions – where a friendly, helpful employee can disguise underlying brand

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inconsistencies – digital interactions only involve the customer and the company, no intermediaries. Consequently, any discrepancies between how the company describes itself and how it actually behaves become glaringly obvious. Here are some key areas of *self-awareness* that companies must understand and integrate into their digital experiences:

- **Company mission.** A company's mission defines its purpose as an organization, explaining why exactly it exists as an organization. As a company's mission forms the core of its identity, companies must design digital experiences in a way that supports and reinforces their mission. Otherwise customers will question the authenticity of the mission and the sincerity of the company. SoulCycle's mission is to "bring Soul to the people," and it accomplishes this by teaching its instructors how to create communities and inspire customers.[14] This mission is inherently high-touch, which presented a challenge online. SoulCycle was able to infuse its mission into the app by enabling customers to buy classes quickly and conveniently, reserve their favorite bikes, find their preferred instructors, see future classes, and so on. To add a human element into the app experience, SoulCycle shows fun pictures of instructors, further fostering a connection between customers and instructors. The app supports SoulCycle's mission by facilitating better, more inspiring in-person experiences when customers ultimately arrive on site.
- **Company vision.** A company's vision paints a picture of what its future looks like if it succeeds in its mission. And given the ever-increasing importance of digital channels, no company's vision can come to fruition if it ignores its digital customer experience. Safelite AutoGlass's brand vision is to "become the natural choice for vehicle glass repair and replacement services." To achieve this vision, Safelite pledges to *Listen*, *Focus*, *Create*, and *Delight*.[15] So when Safelite launched a new version of its website, it applied each of these four elements to help it achieve its ultimate vision. Safelite began the process by *Listening* to customer input, which led it to reduce the number of steps a customer has to go through to reach a price quote or schedule an appointment. The new website allows customers to create personal accounts, manage and track appointments, and save information for later. It *Focused* on making the process more visual and including educational videos to help answer customer questions. It also *Created* an automated "on-my-way" text alert to let customers know when a technician will be arriving. And to ensure that it is truly creating *Delight*, the company made its Net Promoter Score® online survey accessible through customer smartphones.[16] After implementing these digital improvements, Safelite saw the number of customers who scheduled appointments online increase by 12%.
- **Customer promises.** Brand promises are the set of promises that an organization is committed to delivering to customers, and they specifically describe how it intends to treat customers.[17] Whatever brand promises a company makes, it must design its digital experiences to uphold those promises. Financial Engines promises to help customers "build a better future," and it pledges to fulfill this promise by doing things like, "understanding you and your financial goals" and "communicating your progress

[14] Retrieved from https://www.soul-cycle.com/our-story/

[15] See Temkin Group Insight Report, "Lessons in CX Excellence, 2016," (2016).

[16] Net Promoter, NPS, and Net Promoter Score are trademarks of Satmetrix Systems, Inc., Bain & Company, and Fred Reichheld.

[17] See Temkin Group Insight Report, "Translating Brand Promises into Employee Behaviors," (2016).

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toward your goal."[18] These promised behaviors manifest in a number of ways on its digital channels. For example, Financial Engines kicks off its relationship with new customers by immediately getting to know them through a series of personal questions about things like their financial needs, their life stage, their future plans. The financial services company then combines their answers with signals its analytics platform has collected and with information provided by customers' employers about age, salary, balance in their 401(k), etc. Pooling together all this data gives the company a strong understanding of who exactly a customer is as an individual and how it can help them meet their financial goals. Financial Engines also communicates customers' progress towards their financial goals through regular emails and other web-based communications. So, for example, it might send a message congratulating a customer for increasing his savings rate and then suggest clear next steps for continuing towards his goal. In these ways, Financial Engines uses its digital channels to fulfill its promise to help customers build a better financial future.

- **Core brand emotions.** A company's core brand emotions refer to the *specific* feelings that it wants to elicit in its customers. These specific feelings should inform the way a company designs all its experiences, including the digital ones. The California State Lottery has core brand emotions of *optimism, hope, trust,* and *fun*, so it redesigned its website to deliberately evoke these feelings in visitors (see Figure 19). It intensifies their anticipation by revealing winning numbers slowly and dynamically, mimicking the TV experience, instead of statically displaying them as the old site did. It also increases visitors' optimism about winning by showing them where they can find "lucky retailers" and providing them with a lucky number generator. Furthermore, the site helps them to imagine themselves winning by spotlighting stories about local winners and giving them surveys asking what they would do with the winnings.[19]
- **Organizational personality.** Research shows that people relate to companies as if they are fellow human beings rather than inanimate corporate entities. This means that to emotionally engage customers, companies need to intentionally exhibit human-like characteristics. Temkin Group calls this set of characteristics an *organizational personality*, and although the exact makeup will vary from company to company, this personality must be distinctive, authentic, and above all, consistent across the entire company, including digital interactions (see Figure 20). Dove is all about redefining beauty stereotypes, and its *organizational personality* revolves around feelings of honesty, purity, femininity, optimism, and inner confidence. Its website manifests this personality by clearly explaining how Dove products work, using images of real women of different ages, sizes, styles, and ethnicities instead of supermodels, and continuously emphasizing their message that real beauty comes from within. In fact, the opening text on Dove's home screen reads, "Beauty is not defined by shape, size or color – it's feeling like the best version of yourself. Authentic. Unique. Real. Which is why we've made sure our site reflects that. Every image you see here features women cast from real life. A real-life version of beauty." Dove also offers customers numerous opportunities to use digital channels to add their own voice to the brand by sharing their personal real beauty story, by participating in

[18] Retrieved from https://financialengines.com/about-us

[19] The site redesign not only heighten visitors' anticipation about the possibility of winning the lottery, it also nearly doubled the task completion rates, up from 47% to 93%. See Temkin Group Insights Report, "Emotion-Infused Experience Design" (2016).

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Dove's Self-Esteem Project, by tweeting with hashtags like #SPEAKBEAUTIFUL and #RealBeauty, and by using the Dove Ad Makeover Facebook app, which allows people to replace negative body image adds with positive messages and send it to a friend.

#7: Emotional Reflection: Apply Digital Learnings to Future Interactions

Digital channels offer companies a unique opportunity to collect a great deal of useful data from every single customer who visits the site, not just from the ones who agree to fill out a survey after the fact. When used correctly, this data is invaluable for spotting both micro and macro trends, which allows companies to both improve an individual's experience going forward and quickly spot areas that cause problems for a wider swath of customers. Here are some tools companies can use for *emotional reflection*:

- **Session replays.** Unlike in-person experiences, digital experiences offer companies the opportunity to document the exact actions a customer took during an interaction through session replay technology, which enables companies to record and replay customers' exact journey through a website or app. These user recordings allow a company to see exactly how customers interacted with the digital channel – which problems they encounter, which paths they take, when they abandon the experience, which elements they click on, how far down the page they scroll, and so on. Mr. Lender, for example, uses session replay to uncover which parts of its application form gave customers the most trouble, leading them to drop off the page before completing the form. After viewing individual customer sessions, Mr. Lender was able to identify where customers were inputting wrong information and then make those parts of the form clearer.[20] Session replay can also help illuminate customers feedback. So, for example, when a British Airways' customer left an ambiguous comment complaining about not being able to change a booking online, the airline used session replay to watch the customer's experience and determine what exactly the complaint referred to. During the session replay, it realized that the buttons for changing the booking online were missing, something it never would have identified from the customer's comment alone.[21]
- **Customer journey maps.** To help designers focus on the customers' experience, rather than on their own ideas about the product experience, Moven includes specific emotions in its customer journey map (see Figure 21). It starts with an archetype based on different customer motivations, such as being budget conscious versus looking for an alternative to typical banks. Moven then identifies how the archetype is thinking, feeling, and what emotions they are likely experiencing during a particular digital interaction. The emotions Moven uses are taken directly from Plutchick's Wheel of Emotions. So, for example, when Moven mapped out the journey of a budget conscious archetype who is checking the app to see if she can afford to go out for lunch, it determined that the customer experiences emotions of interest as she opens the Moven app, which turns into anticipation while viewing the home screen. As she swipes to see her wellness score, she feels acceptance as well as anticipation, and the

[20] These changes ultimately led to a 32% drop in the average time it takes to complete the application form and a 20% increase in e-sign rates. Retrieved from https://sessioncam.com/case-studies/mr-lender-sessioncam-case-study/

[21] Retrieved from https://www.decibelinsight.com/hubfs/Content/Case_Studies/British_Airways/CaseStudyBritishAirways.pdf?t=1479208274322

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depending on her wellness score, closes the app feeling either self-admiration or vigilance, annoyance, and anger. By sharing the customers' emotional journey as they use the app, Moven ensures that designers are continuously thinking about and designing for different emotional states.

- **Usability tests.** Companies can capture customers' emotions as they go through a digital interaction through usability testing, which is where companies observe real customers to go through an experience to determine which parts they find problematic or confusing. Usability tests are especially helpful for gaining buy-in across the organization as members of different departments can see exactly how customers behave and feel during a digital interaction. So, for example, HomeAdvisor has a usability testing lab onsite where people from across the organization – like user experience designers, product teams, IT teams, development teams, etc. – can easily come watch customers in action and hear feedback firsthand. This helps departments who are usually removed from customer's feedback see that the way they expect customers to go through an interaction is often not the way they actually do. And if, for instance, the design team and development team disagree about the best way to proceed on a project, they can each build a version and then watch how real customers interact with each one.
- **Inception workshops.** Great digital experience design requires an organization to share customer information across silos. Unfortunately, at most organizations, the information about customer emotions is housed solely in the marketing department, inaccessible or unknown to those within other departments. Before American Specialty Health kicks off a new project, it creates a shared understanding of the customer by holding Inception Workshops. The workshops typically bring together over 15 key stakeholders from across the organization to outline what the project hopes to achieve and how it will achieve it, and they can last anywhere between three hours and a full day. The workshop begins with the sponsor discussing why the project is necessary, before building out context (what are the hopes and fears) and then laying out the business objectives. Frequent break-out sessions allow the larger group to band together as smaller teams on rapid ideation, synthesis, and customer journey modeling. Each team presents their elevator pitch for the project, detailing which customer it is for, what problem it solves, and which solutions should be considered. Finally, participants generate empathy maps for the target customers, which outline what target users would be thinking and feeling, what they would be seeing and hearing, and what they would be saying and doing. By developing and debating the salient aspects of these projects, stakeholders from across the organization form a shared understanding of who exactly the customer is and how they are likely to feel during each touchpoint with ASH. This practice has reduced churn and provided a cohesive vision for the organization to rally around its customers.

APPLYING *THE HUMAN CONVERSATIONAL MODEL*

To demonstrate how to apply *The Human Conversational Model* to digital customer experience design, we applied elements of it to three types of digital activities (see Figure 22):

1. **Open a new bank account online.** Opening a new bank account online can be an emotionally harrowing experience for customers as they are required to hand over a

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great deal of personal information without the assurance that comes with doing business with an official employee. A bank can apply several components of the Empathetic Agility element to make its customers feel more secure and valued. First of all, to make a customer feel like it cares about him as an individual, the bank can introduce an AI concierge that asks the customer questions about his current finances, future plans, savings, location, desired features, and so on, and then, based on his answers, show him progressively more tailored product options. A good portion of customers are likely to still feel uncomfortable with the process of opening a new account without any human support, so the bank should offer live chat, prominently display phone numbers to reach a call center agent, and, for customers who prefer even higher-touch interactions, give directions to the local bank branch. And while the bank may always want customers to feel secure and trusting, it should recognize that customers at the beginning of the journey may want to feel more excitement and interest, whereas customers towards the end of the journey may want to feel more relaxed and confident, and then design interactions to elicit those particular emotions at those particular times.

2. **Use an app to purchase shoes.** Customers who download a retail app are inviting the retailer into their personal space, and in return, they expect the retailer to recognize who they are as an individual. When a customer returns to the app to purchase a pair of shoes, the retailer can apply the Intent Decoding element of *The Human Conversation Model* by combining all the data it's previously collected on the customer – like purchase and browsing history, support interaction, location data, social media interactions, etc. – and then using it to proactively show her products and offering relevant to her interests, such as her preferred brands or favorite shoe type. The retailer can also make educated guesses about what she'd like to purchase based on external factors like the time of year, fashion trends, and upcoming holidays. It should also assume by default that the customer will want to use the billing and shipping information she's used for her previous purchases. Furthermore, given the fact that the suitability of shoes can be hard to gauge over a digital channel, the retailer should anticipate that she might want to try on the shoes in person before making a final purchase decision, and therefore it should proactively and straightforwardly tell her about its return policy.
3. **Get tech support online.** Most people find technology to be both vital and intimidating, which means that customers seeking tech support are likely to arrive at the interaction feeling overwhelmed and confused. When applying the Supportive Feedback element to an online tech support interaction, a company should begin by acknowledging how little technical jargon the customer will likely understand and adjusting its communication style to use simple and straightforward language. When a customer is providing the company with information about his technical problem, he may not know how to find important information – such as a computer's serial number, operating system, or processor – so the company should use microcopy to give him directions about how to locate this information (e.g. "Found by clicking on the Apple icon and selecting About this Mac."). Customers are also unlikely to know how many steps are necessary to finish the debugging process, so the company should minimize uncertainty by explicitly detailing out which steps he can expect to go through, highlighting which one he is currently on, and listing out which steps will be next.

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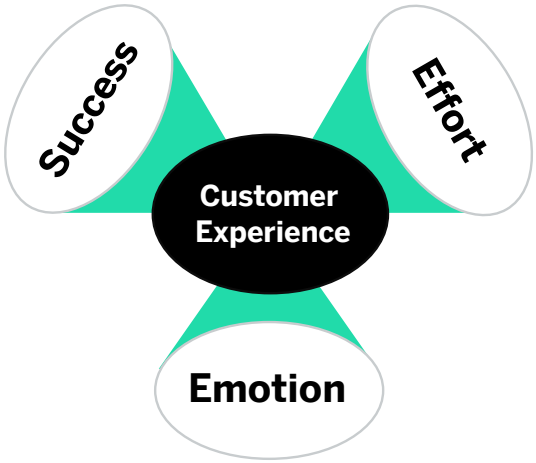
The Three Components of a Customer's Experience



Questions Used for the Temkin Experience Ratings

Success Experience Component

Thinking of your most recent interactions with each of these companies, to what degree were you able to accomplish what you wanted to do?

1	2	3	4	5	6	7
Completely Failed			Neutral			Completely Succeeded

Effort Experience Component

Thinking of your most recent interactions with each of these companies, how easy was it to interact with the company?

1	2	3	4	5	6	7
Very Difficult			Neutral			Very Easy

Emotion Experience Component

Thinking of your most recent interactions with each of these companies, how did you feel about those interactions?

1	2	3	4	5	6	7
Upset			Neutral			Delighted

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Figure 1

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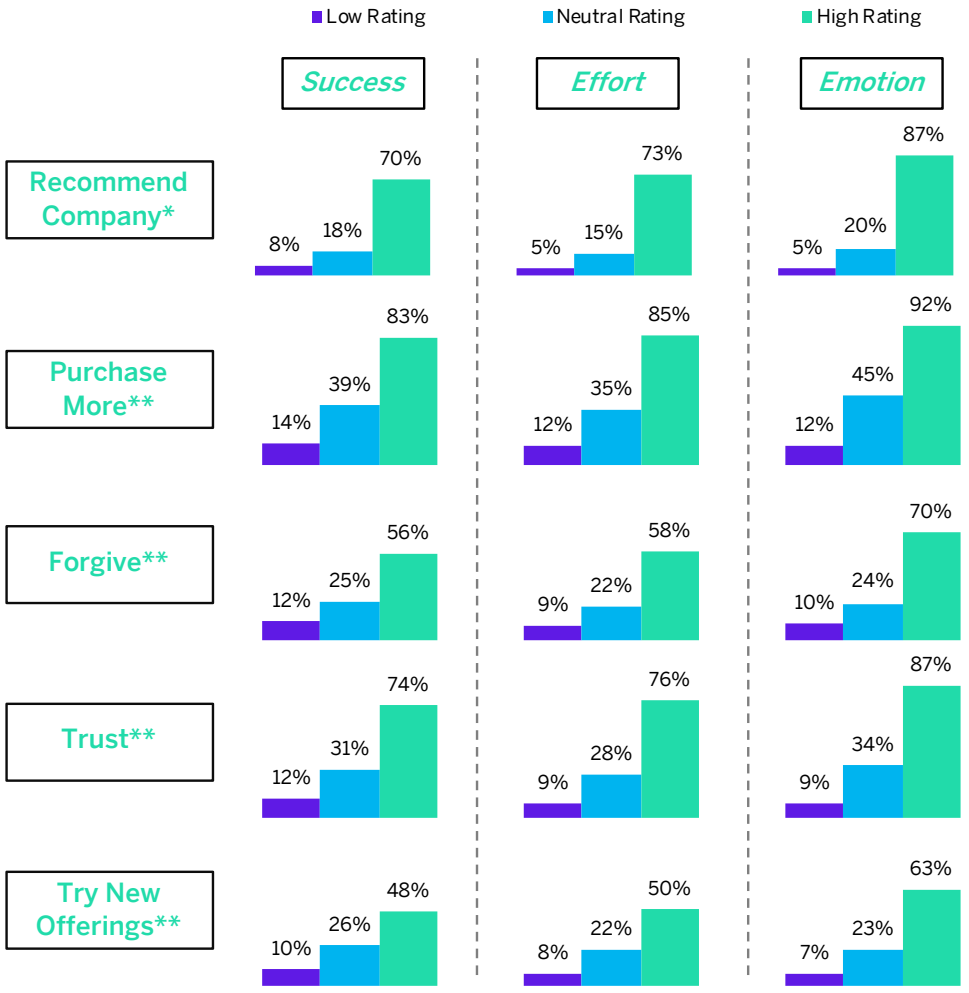
Impact of *Success*, *Effort*, and *Emotion* on Loyalty

Loyalty of Consumers Based on How They Rate Customer Experience in Three Areas of Temkin Experience Ratings: *Success*, *Effort*, and *Emotion*



*These numbers represent the percentage of consumers that selected 9 or 10 on an 11--point scale between 0 (Not at all likely) to 10 (Extremely likely).

**These numbers represent the percentage of consumers that selected 6 or 7 on a scale between 1 (Extremely unlikely) to 7 (Very likely).

Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2016 Consumer Benchmark Study

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Figure 2

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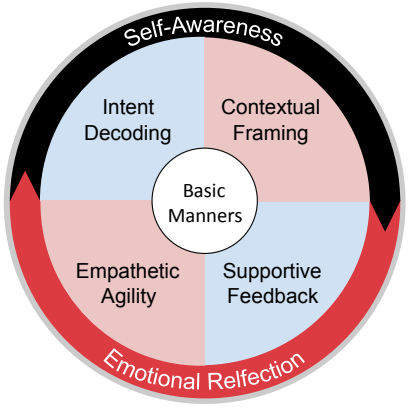
The Human Conversational Model



	Digital Interactions	Human Interactions
Intent Decoding	Make reasonable assumptions about what a particular customer wants to do during a particular interaction, then make it easier for them to achieve those goals.	Detect what partner hopes to achieve from the conversation (e.g. small talk, knowledge sharing, bonding, etc.) based on context, content, and shared history.
Contextual Framing	Use data collected on customers to build context around them, and then tailor communications and interactions to individuals' preferences.	Take stock of partner's traits (e.g. appearance, age, gender, comportment, style, interaction history, etc.) and then tailor the conversation accordingly.
Empathetic Agility	Be responsive to customers' changing emotional states by identifying likely emotions and by observing digital body language in real time.	Interpret verbal and non-verbal clues to deduce emotional state of partner and then alter behavior to keep conversation positive.
Supportive Feedback	Minimize uncertainty by letting customers know they are on the correct path to success.	Give partner feedback that they are being heard and understood through both verbal and non-verbal cues (e.g, head nodding, asking relevant questions, etc.)
Basic Manners	Design digital interactions to behave like a charming, polite, and helpful employee.	Cooperate with partner by demonstrating good manners and adhering to social norms.
Self-Awareness	Have a crystal-clear understanding of brand identity and design digital interactions that embody this identity.	Arrive at conversation with clear understanding of own personality, feelings, motivations, needs, desires, beliefs, strengths, and weaknesses.
Emotional Reflection	Use data collected during digital interactions to spot micro and macro trends, and adjust future interactions accordingly.	As you learn more about partner during the conversation, apply learnings to that partner and future partners in general.

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Figure 3

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Best Practices Across *the Human Conversational Model*

	Digital Interactions
Intent Decoding	▪ Recognize patterns ▪ Make educated guesses ▪ Remember past interactions ▪ Follow the 80/20 Rule ▪ Ask questions
Contextual Framing	▪ Group together like-minded customers ▪ Customize content ▪ Create an onboarding process ▪ Modulate tone ▪ Look at the wider journey ▪ Integrate with other technologies
Empathetic Agility	▪ Use virtual agents ▪ Introduce an AI concierge ▪ Send exit-intent pop-ups ▪ Make it easy to reach a human ▪ Use videos ▪ Elicit different feelings at different times
Supportive Feedback	▪ Adjust communication style ▪ Use functional sounds ▪ Update customers on their progress ▪ Use visual feedback to indicate delays ▪ Give clear instructions on next steps ▪ Use microcopy
Basic Manners	▪ Fade into the background ▪ Design for mental models ▪ Demonstrate trustworthiness ▪ Don't interrupt ▪ Make information easily digestible
Self-Awareness	▪ Company mission ▪ Company vision ▪ Customer promises ▪ Core brand emotions ▪ Organizational personality
Emotional Reflection	▪ Session replays ▪ Customer journey maps ▪ Usability tests ▪ Inception workshops

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Figure 4

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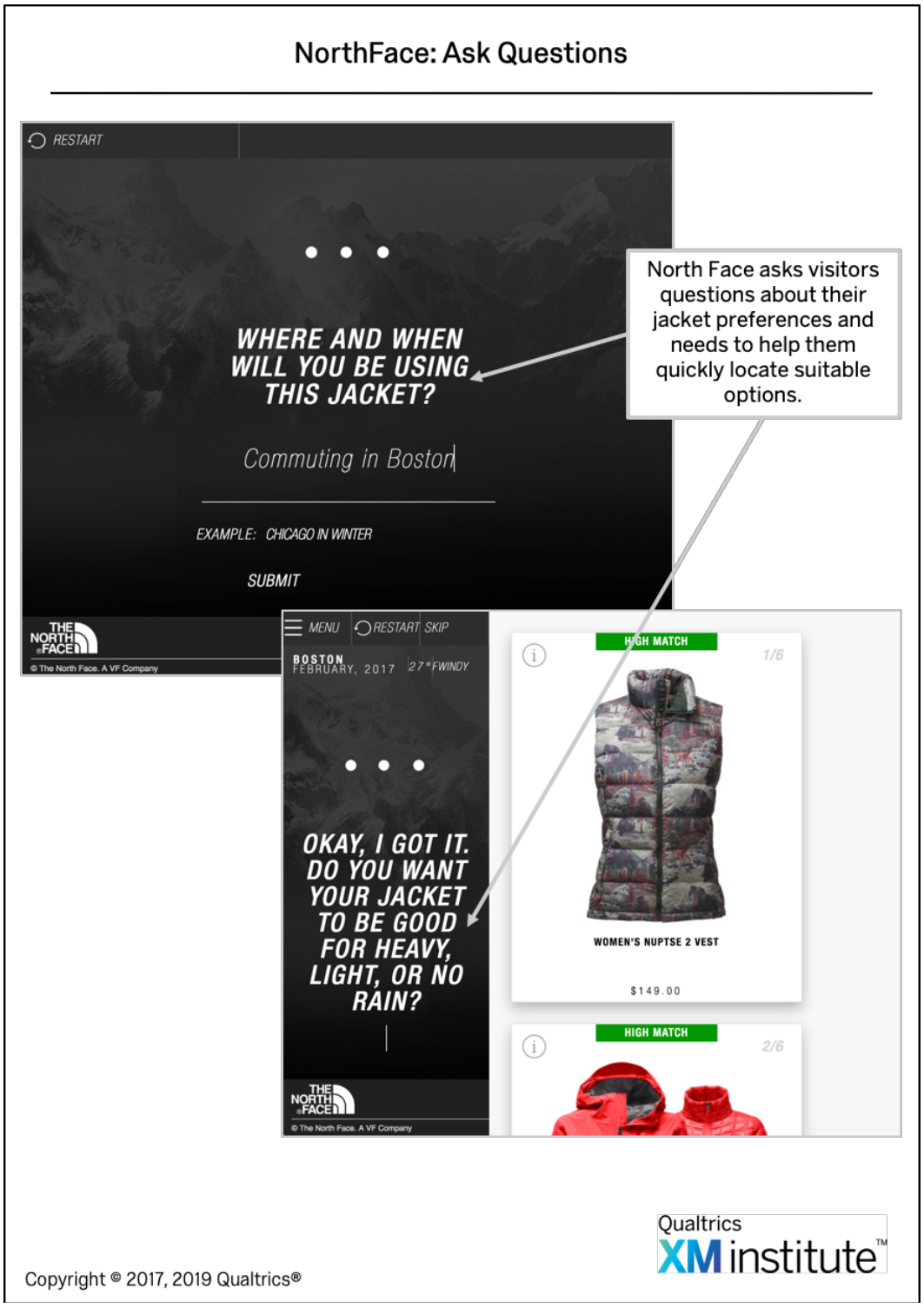

Figure 6

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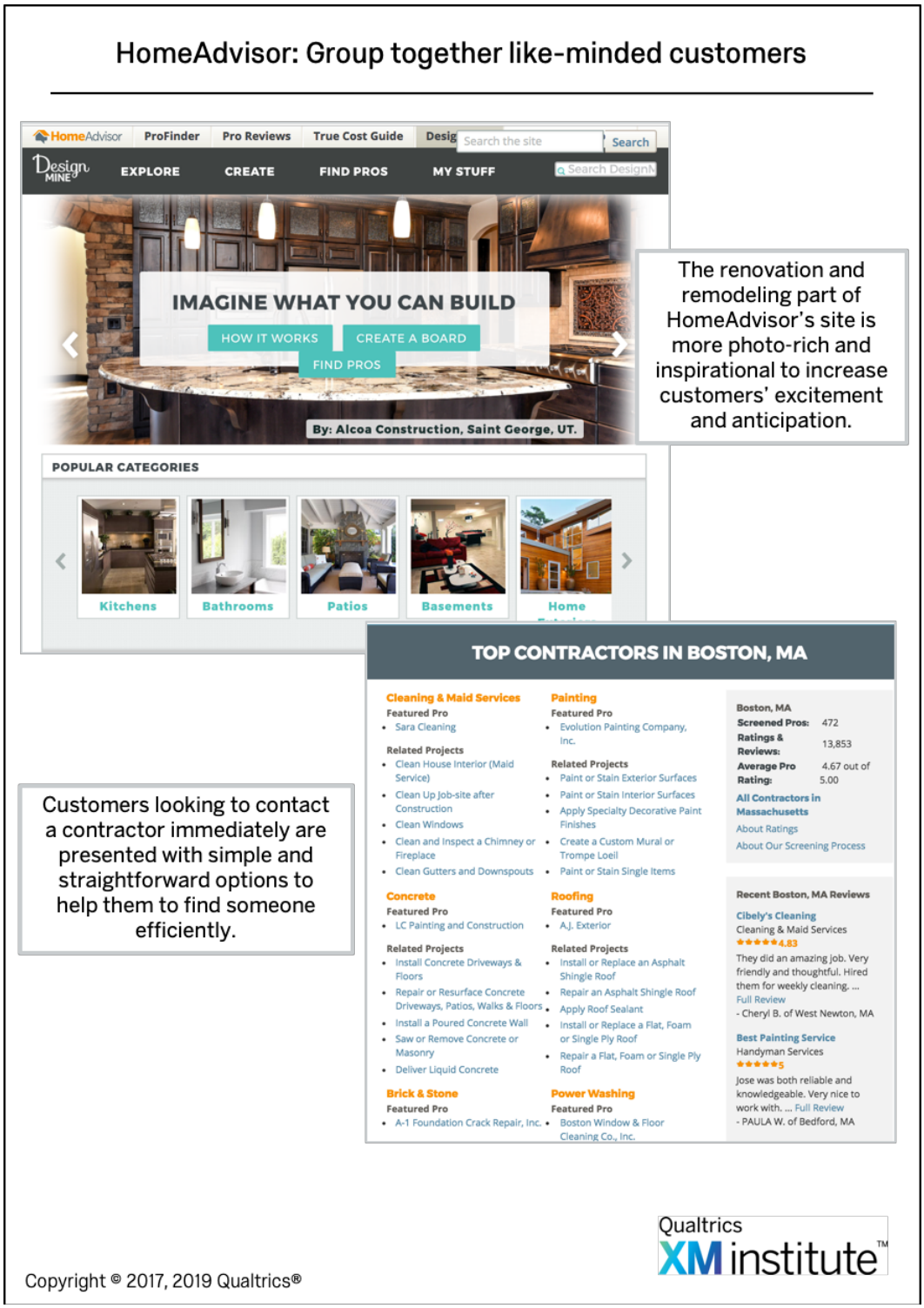

Figure 7

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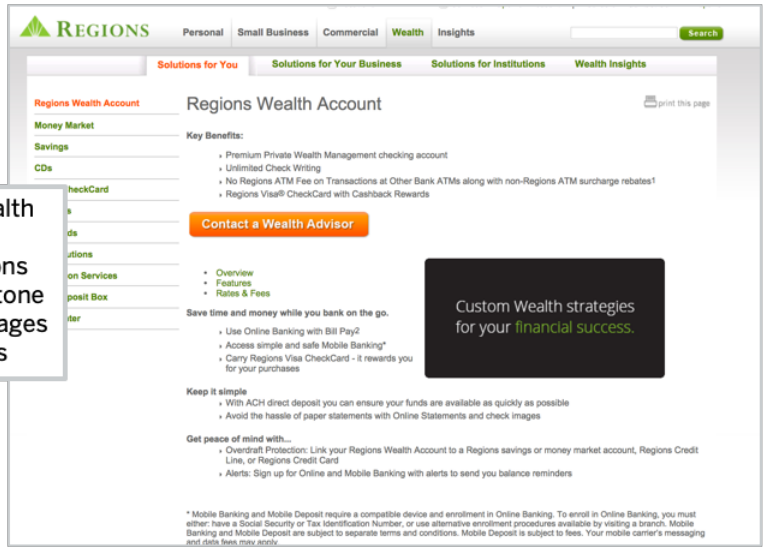
Regions Bank: Modulate tone

During consumer banking interactions, Regions Bank uses an informal, friendly tone of voice along with visual imagery and lighter colors.



During premier wealth management interactions, Regions Bank uses a formal tone of voice with less images and darker colors

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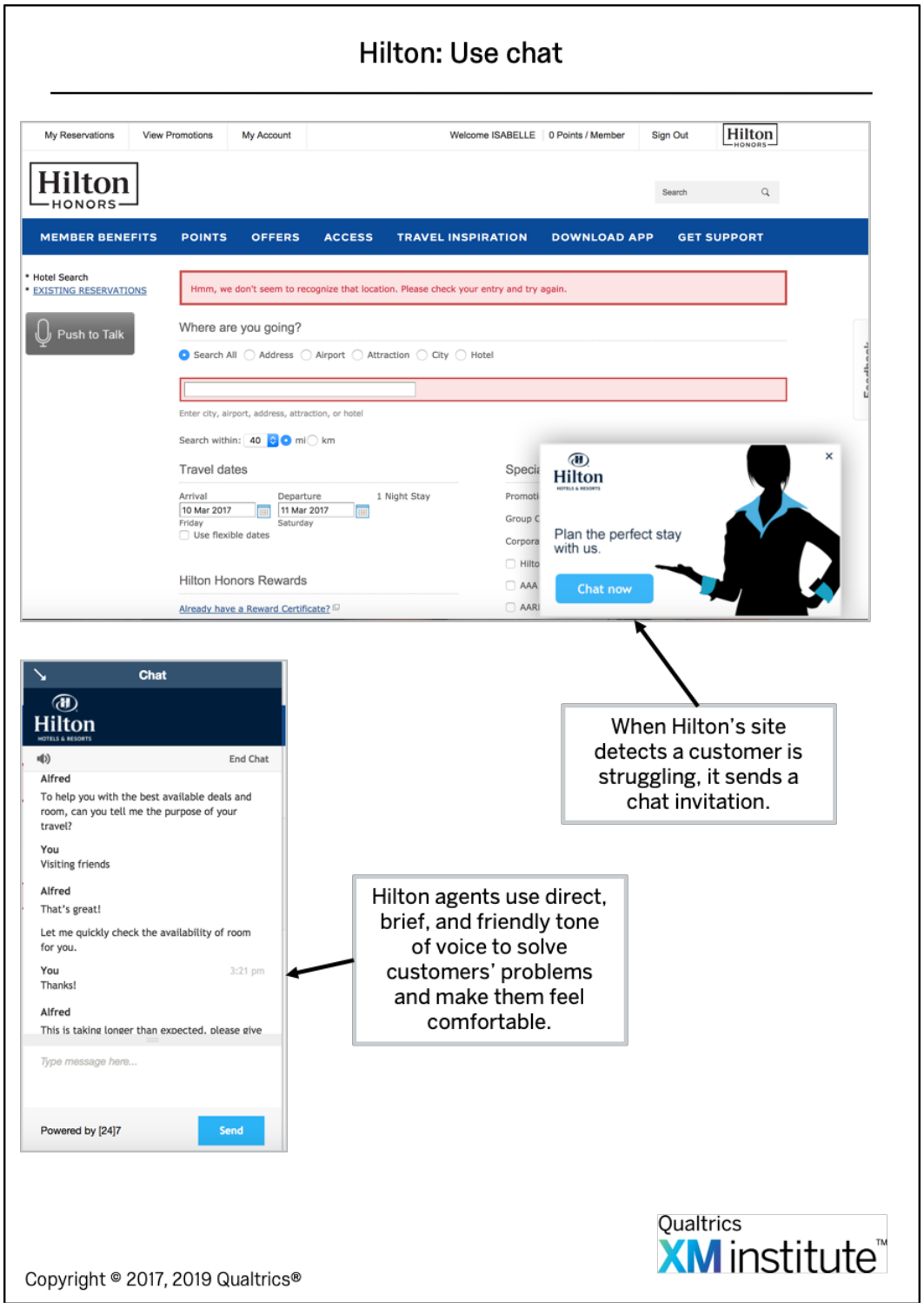

Figure 9

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Types of Digital Body Language

Type	Interpretation
Mouse movements[1]	▪ Precise and smooth mouse movements indicate feelings of calm ▪ Abrupt changes in mouse direction indicate negative emotions ▪ Moving a mouse greater distances indicates negative emotions
Scrolling	▪ Repeated scrolling up and down a page indicates confusion and problems locating desired path – likely to exit shortly. ▪ Slow scrolling down the page indicates engagement and focus
Backtracking	▪ Retracing steps indicates confusion and disorientation
Time on page	▪ Long time idle on a page without scrolling indicates disinterest and disengagement ▪ Long time on page while scrolling, zooming, or hovering indicates interest and attention
Keystrokes[2]	▪ Short keystroke duration indicates more force used in typing, meaning higher arousal (e.g. excitement or anger as opposed to tired, sad, or bored) ▪ Slow typing indicates neutral state of customer arousal, faster typing occurs in high and low arousal states

1. Grimes, G.M., Jenkins, J.L., & Valacich, J.S. (2013). Exploring the effect of arousal and valence on mouse interaction. Thirty Fourth International Conference on Information Systems. Milan, Italy. Retrieved from https://pdfs.semanticscholar.org/77b1/f612fe2baa9c505eafb228ed055a57b4ebd3.pdf
2. Lee, P., Tsui, W., & Hsiao, T. (2015). The influence of emotion on keyboard typing: an experimental study using auditory stimuli. PLoS One, 10(6): e0129056. Retrieved from https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4465979/

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Figure 10

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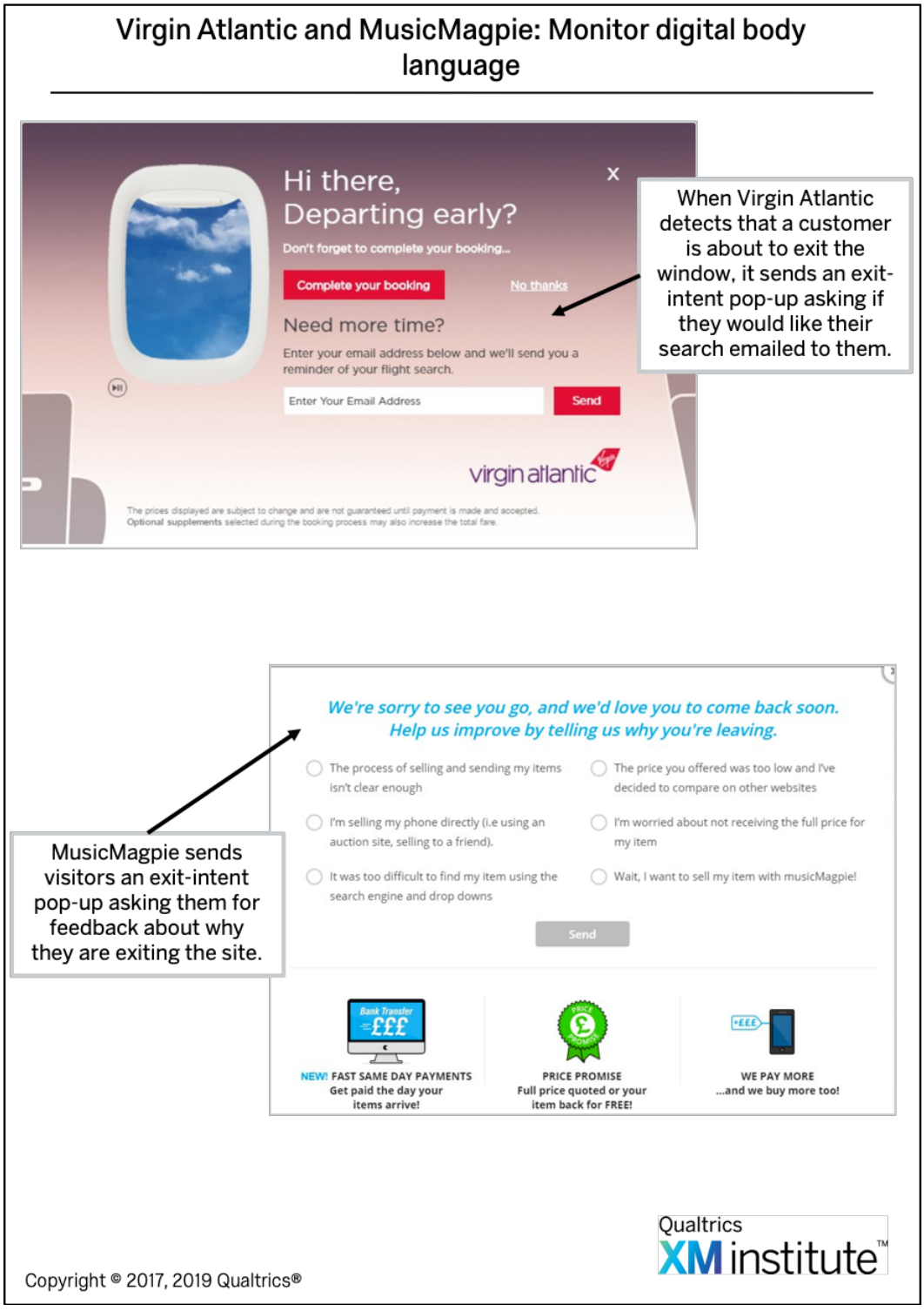

Figure 11

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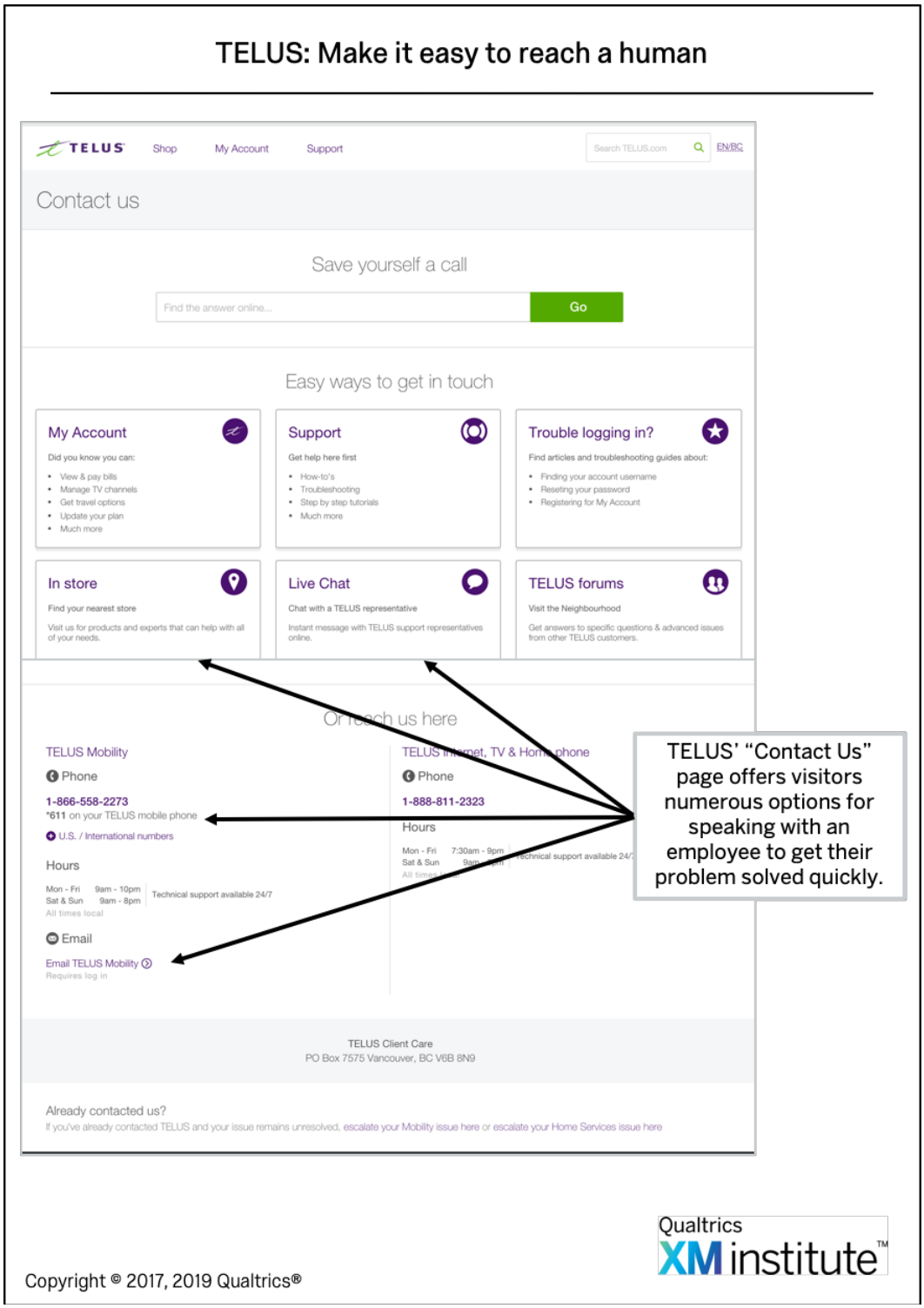

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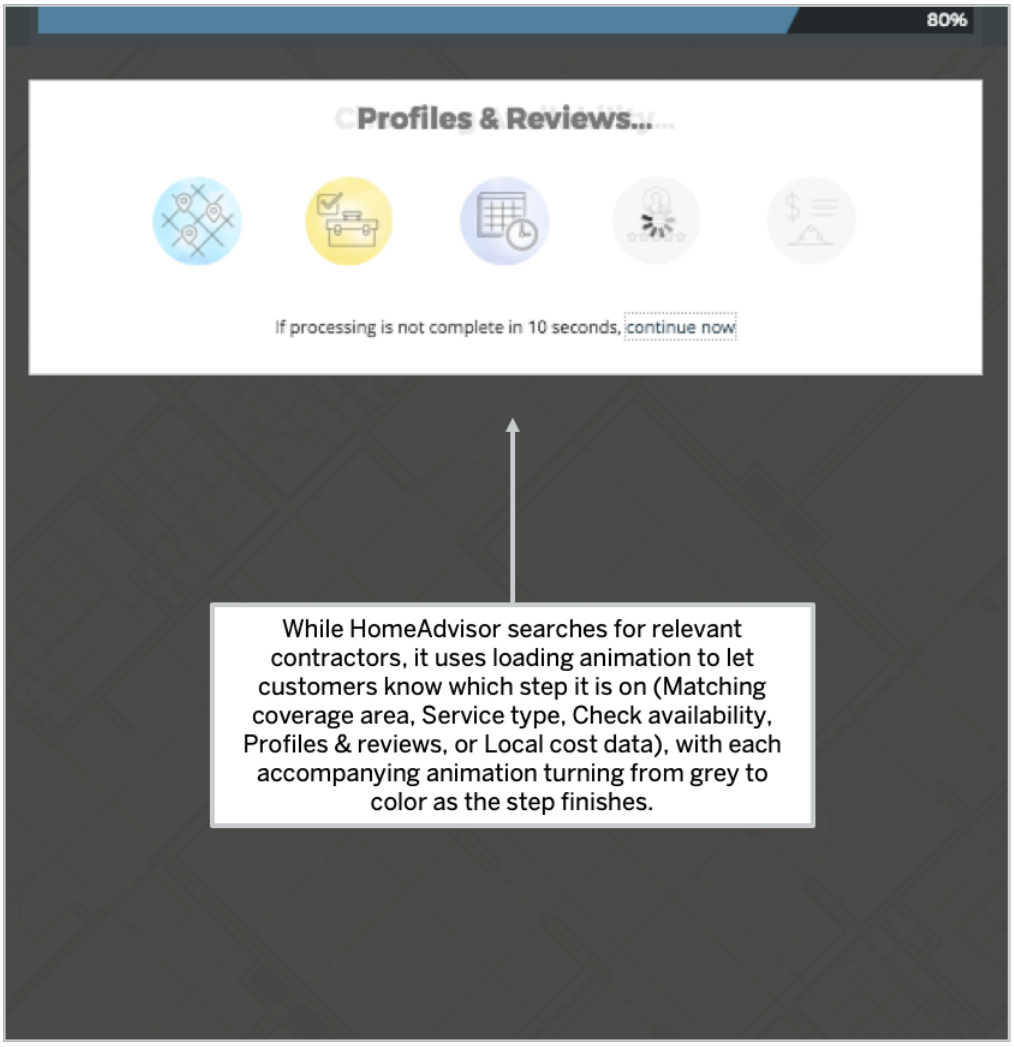
HomeAdvisor: Use loading animation to indicate delays



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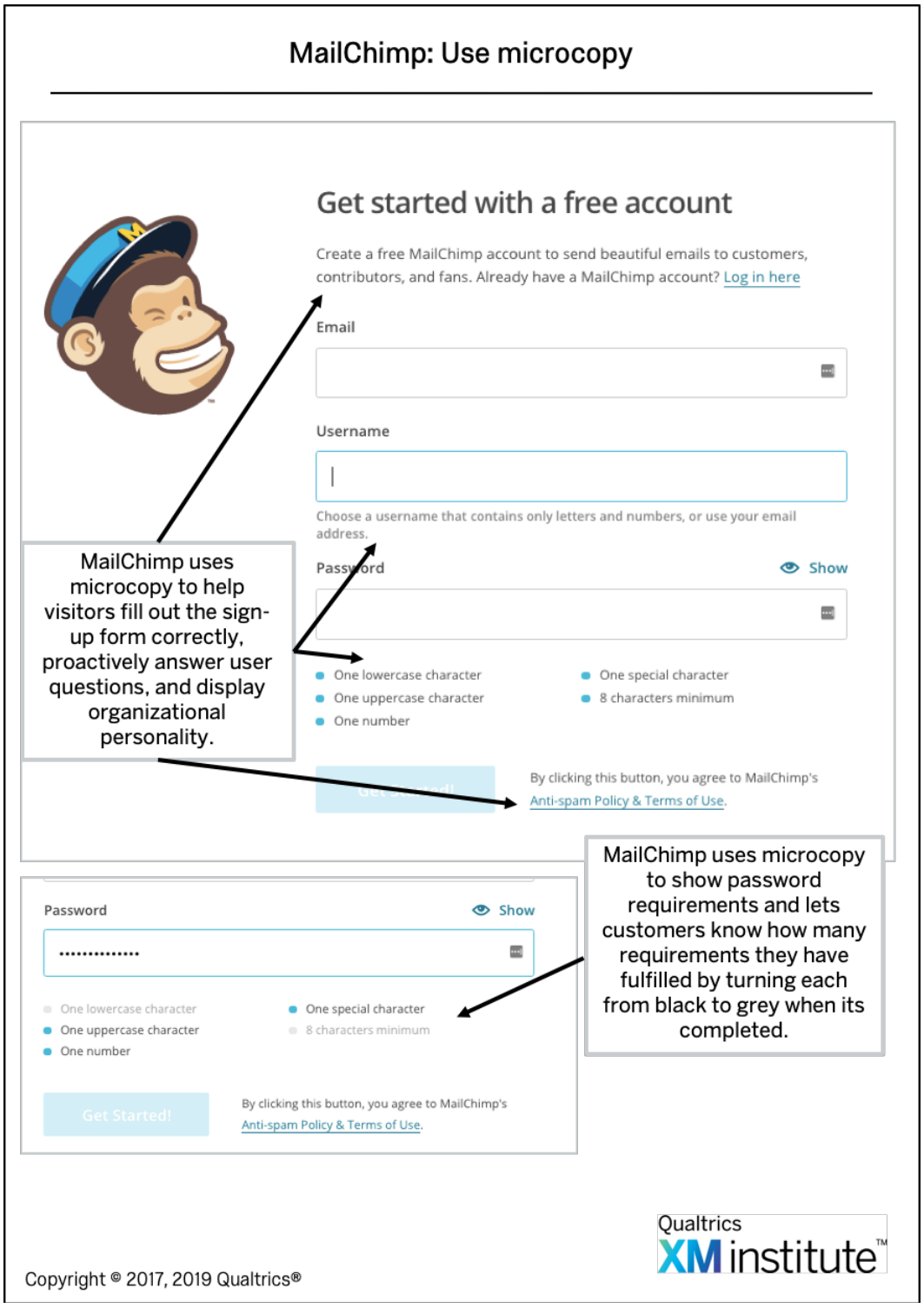

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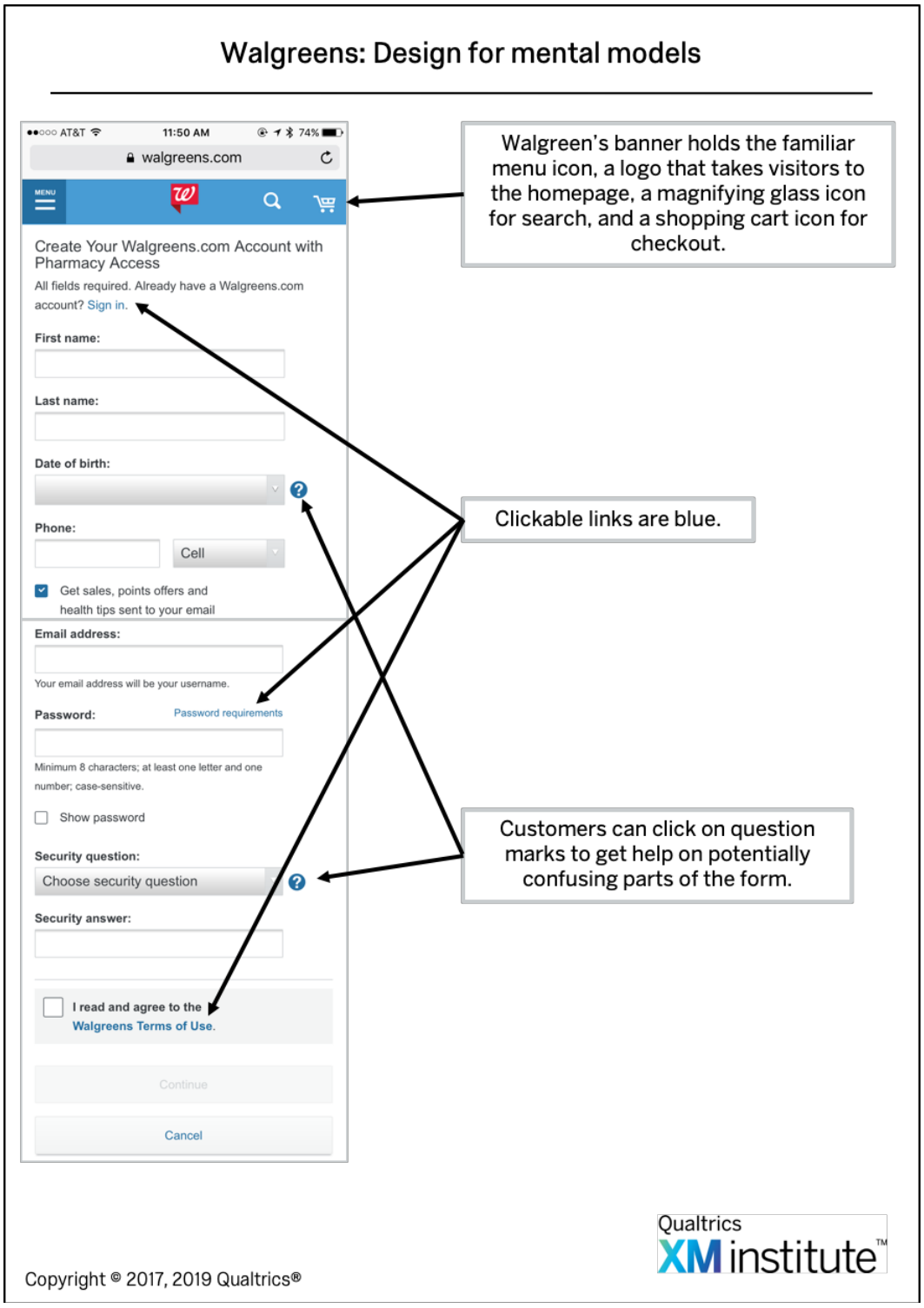

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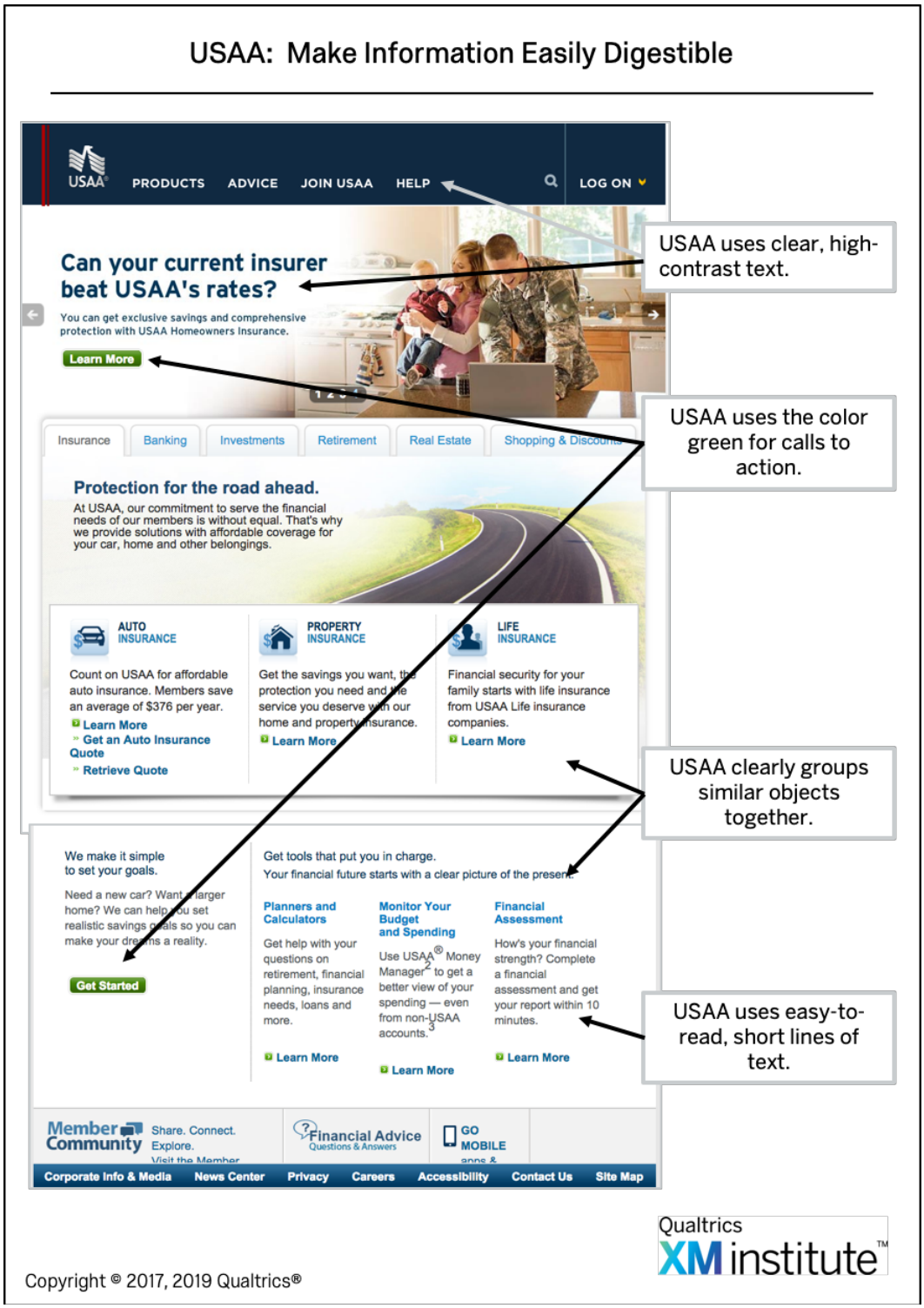

Figure 18

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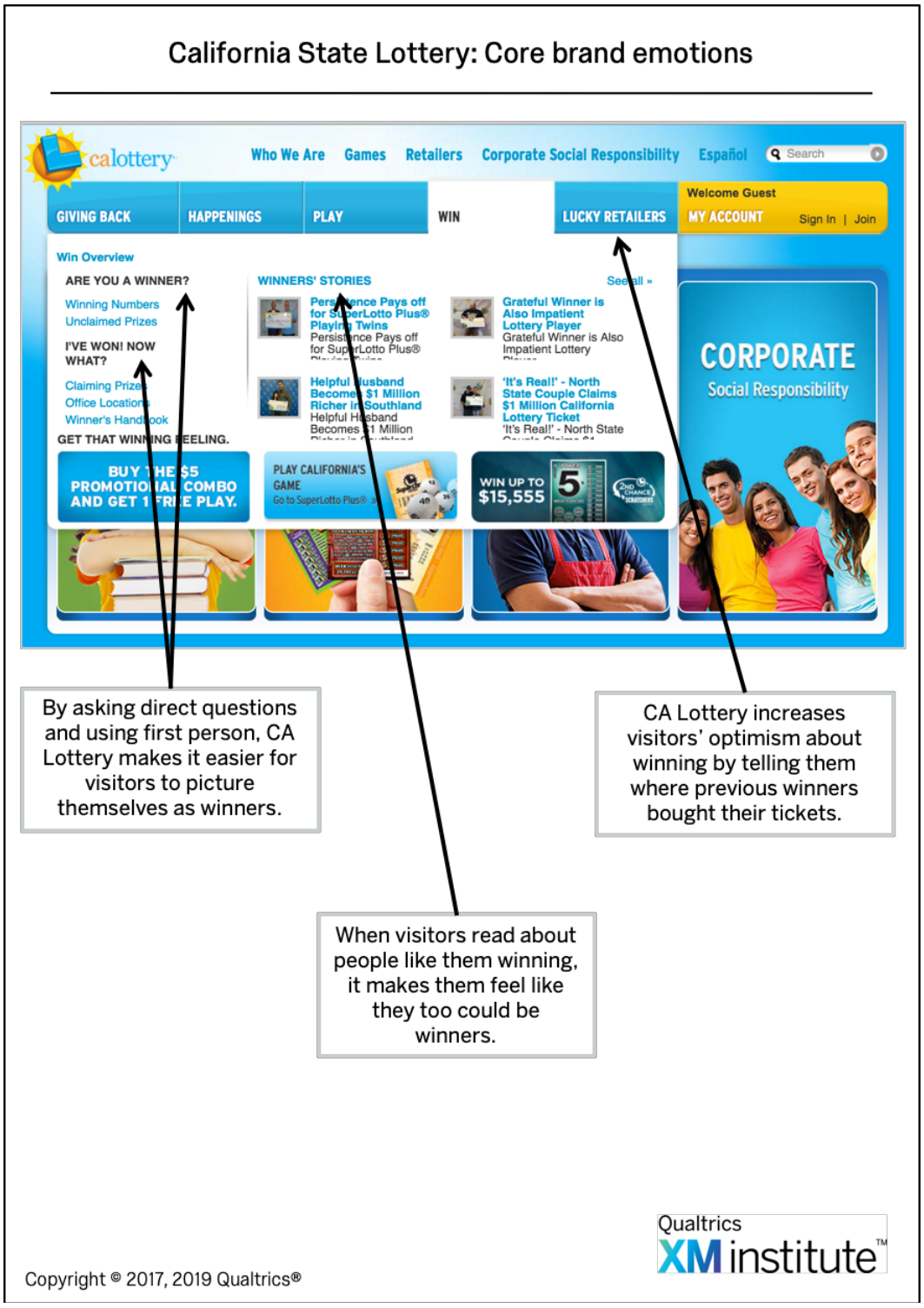

Figure 19

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Organizational Personality

Attribute	Description	Examples
Appearance	How company's products, environments, advertisements, website, etc. look.	▪ Colors ▪ Logos ▪ Fonts ▪ Shape of products ▪ Brand characters/mascots
Behavior	How a company behaves towards customers.	▪ Response time ▪ Ease of communicating with company ▪ Living up to promises
Tone	The tone of voice in which a company communicates with customers	▪ Attitudes ▪ Writing style ▪ Taglines ▪ Call center agent scripts (or lack thereof) ▪ Greetings (both in person and digital)
Beliefs	A company's guiding philosophy and principles that inform its decisions	▪ Brand values ▪ Mission statement ▪ Corporate social responsibility

To be successful, an *organizational personality* must be:

- ☑ **Compatible** *(congruent with target customer's personality)*
- ☑ **Distinctive** *(easily recognizable and distinguishable from competitors)*
- ☑ **Authentic** *(used to inform all company decisions and responses)*
- ☑ **Consistent** *(infused throughout the entire organization)*

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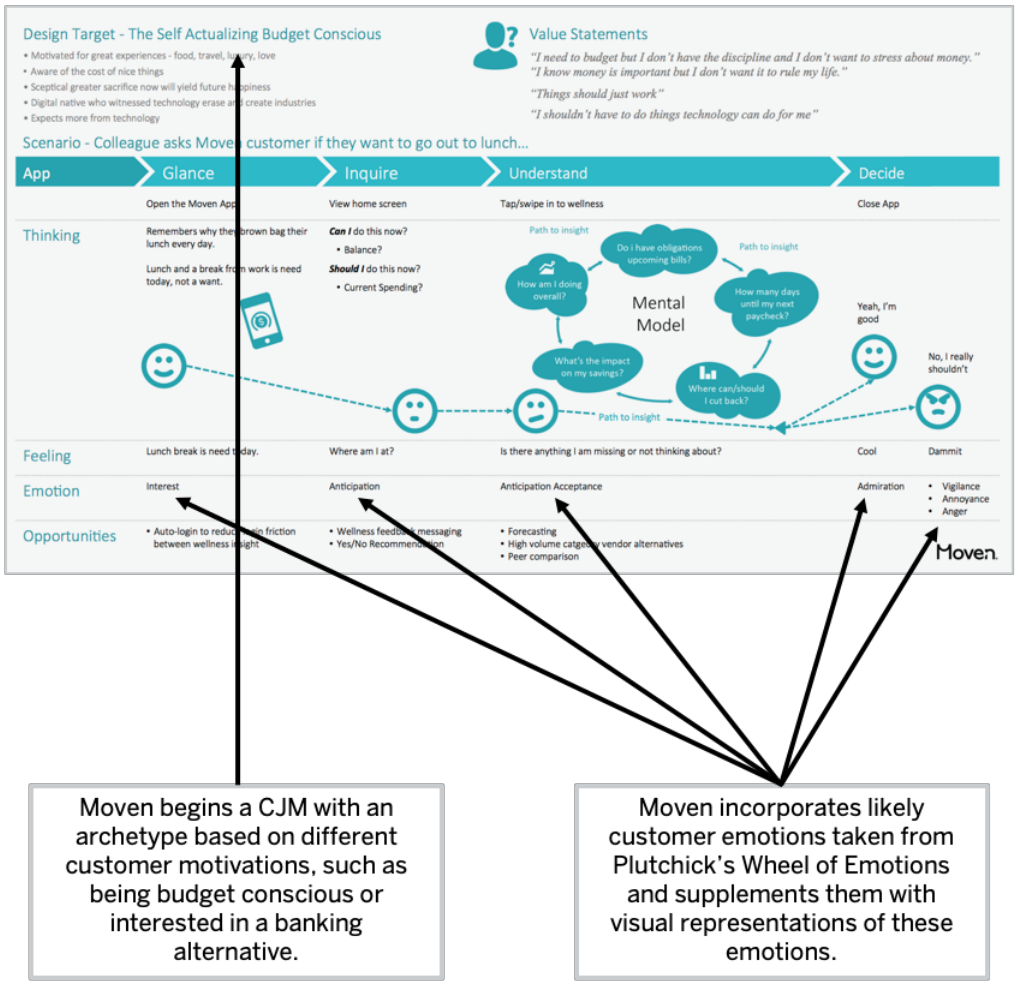
Moven: Incorporate Emotions Into CJM



Moven begins a CJM with an archetype based on different customer motivations, such as being budget conscious or interested in a banking alternative.

Moven incorporates likely customer emotions taken from Plutchick's Wheel of Emotions and supplements them with visual representations of these emotions.

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Applying *The Human Conversational Model*

	New Bank Account	Buying Shoes	Tech Support
Intent Decoding	Since a bank's data shows that people going to its site are frequently looking for a bank account, prominently display options for opening a new bank account.	Combine information about the time of year and past history to prominently display relevant products on the home page.	Expect customers to be tense and worried, so start interaction with easy to understand options to put customer at ease.
Contextual Framing	Adjust tone through the process, amplifying initial excitement with pictures and a friendly voice and then using more formal language during the form completing process.	Allow the customers to see if their favorite shoes are in stock at the nearest brick-and-mortar location, and provide directions to that location.	Use registered customers' information to proactively send them appointment times with local tech support.
Empathetic Agility	Introduce an AI concierge that asks customers about their personal finances, plans, goals, location, etc.	Make it easy for customers to call, chat, or email with a simple click of a button, in case they can't find the shoes that they're looking for.	Proactively offer to connect a low-tech customer with a live agent if customer seems to be having difficulty.
Supportive Feedback	Use microcopy to help customers accurately fill out the application form.	Recognize that shoes may not fit, so make it easy for customers to find return information and send back their unwanted purchases.	Keep customer aware of there progress when they are being asked to go through a debugging process that may take several steps.
Basic Manners	Design an aesthetically pleasing website, and be clear and transparent about fees.	Instead of text heavy pages, use simple design with minimal copy and lots of clear pictures.	Don't use technical terms that the customer is unlikely to understand.
Self-Awareness	Make customers feel secure and confident, key elements of the banks brand values, as customers set up their new account.	Write thank-you page and confirmation email in a distinct, friendly tone of voice that matches the company's brand attributes.	If the brand is about being easy, make sure that the customer can fix their problem with minimal effort.
Emotional Learning	Look for any part of the experience where customers are slowed down or unsure about what to do, and apply resources to fix the issues.	Use A/B testing on a panel of customers who are in the segment that do not feel as though the company is acting in a friendly manner.	Watch session replays to learn where customers got stuck in the process and the paths they took to find help.

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