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INSIGHT REPORT

Propelling Experience Design Across an Organization

BEST PRACTICES FOR FEDERATING *EXPERIENCE DESIGN*

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EXECUTIVE SUMMARY

Although customer experience (CX) management has become a relatively common activity within large organizations, companies still struggle to deliver consistently positive experiences to their customers. One major issue impeding companies' current CX efforts is that few organizations design customer interactions in a purposeful and deliberate manner. This report explores how companies can use *Experience Design* – which we define as *a repeatable, human-centric approach for creating emotionally resonant interactions* – to craft consistently excellent interactions and how they can share and spread these capabilities across the entire organization. Here are some highlights:

- The *Experience Design* process is made up of three generic phases (*Clarification*, *Generation*, *Realization*), each of which contains two stages (*empathize* and *synthesize*, *conceptualize* and *materialize*, *scrutinize* and *actualize*).
- To help propel *Experience Design* capabilities across the organization, we developed *The Federated Experience Design Model*, which is made up of three tiers of employees – Experts, Boosters, and Dabblers.
- We share over 30 examples of best practices from companies that are spreading and sharing *Experience Design* capabilities throughout their entire organization.
- We also provide some tools that employees can use across the six stages of the *Experience Design* process.

CUSTOMERS SUFFER FROM HAPHAZARD EXPERIENCES

Over the last few years, customer experience (CX) management has become an increasingly mainstream activity within large organizations. Yet surprisingly few companies deliver excellent experiences.[1] What accounts for this discrepancy between companies' CX efforts and their CX results? One key deficiency hampering these efforts is organizations' lack of purpose in how they craft interactions. Instead they tend to:

- **Address only expressed needs**. While most companies will listen to customers when they complain about a problem, reactively responding to specific complaints does not, in and of itself, constitute a good customer experience. Particularly because customers are often unable or unwilling to articulate their true needs and desires. So, for example, a bank customer may complain about the length of time she had to wait on hold when in fact, her negative response stems more from the brusque way the representative treated her after the long wait than the wait itself. By addressing only

[1] Only 6.6% of large organizations deliver experiences that customers consider "excellent." See Temkin Group Insight Report, "Temkin Experience Ratings, 2018," (March 2018).

the customer's stated problem – the long wait – the bank would waste precious time and resources fixing the wrong issue.

- **Look through siloed lenses**. Companies naturally sort their employees into separate divisions, departments, and teams. While this may make operations more efficient, it often leads to employees developing wildly different views of customers. These misaligned views can cause an organization to either address only a narrow set of customer needs or piece together a disjointed experience. For example, if, say, a number of new customers call a company after the launch of a digital campaign, marketing may view this as a success – their job, after all, is to fill the pipeline with prospects – while the service organization may view this exact same event as a failure as they are being overwhelmed with calls and can't scale to fix the issue.
- **Ignore emotion**. Our research shows that how customers feel about their interaction with an organization has the most significant impact on their loyalty to that organization.[2] And yet, despite the importance of emotions, few companies are good at measuring customers' emotional responses or designing experiences that fulfill their emotional needs.[3] This is problematic as every single interaction a customer has with an organization will elicit some kind of emotional response. So by neglecting emotions, companies ensure that the emotions they evoke in customers during an experience are random at best, negative at worst.

Companies Need More *Experience Design*

To create excellent experiences, companies must craft customer interactions in a purposeful and deliberate manner. This means improving their *Experience Design* capabilities, which are currently severely lacking.[4] Although the concept of *Experience Design* has been around for some time, we were unable to find a clear, universal definition for it. Temkin Group therefore defines *Experience Design* as (see Figure 1):

A repeatable, human-centric approach for creating emotionally resonant interactions

Experience Design allows companies to intentionally craft their products, services, processes, and interactions in a way that delivers a consistently positive experience to customers. When practiced widely across the organization, this approach helps organizations to:

- **Uncover latent desires, not just explicit requests.** *Experience Design* is not about simply implementing suggestions made by stakeholders or customers. It begins with an intense focus on understanding customers' real goals, desires, and beliefs. It uses this deeper understanding of customers to identify their unmet – and often unexpressed – needs and then translates those latent desires into opportunities for the company.
- **Enhance customer journeys, not just isolated interactions.** *Experience Design* aims to create experiences that establish lasting emotional relationships with customers,

[2] See Temkin Group Insight Report, "ROI of Customer Experience, 2016," (October 2016).

[3] See Temkin Group Insight Report, "Temkin Experience Ratings, 2018," (March 2018).; Temkin Group Insight Report, "The State of CX Metrics, 2017," (December 2017).

[4] Only 20% of large organizations agree that their company uses human-centered design approaches to design interactions across all touch points. See Temkin Group Insight Report, "State of CX Management, 2018," (April 2018).

which means that it considers their interactions within a wider context, evaluating their experiences through the lens of customer journeys rather than individual touchpoints.

- **Address customer emotions, not just success and effort.** Unlike most other design processes, which try to make products and services more functional or easy to use, *Experience Design* strives to create solutions that emotionally connect with customers by addressing their feelings, desires, and needs.
- **Create with customers, not just for customers.** Customers – not the company – are the ultimate judges of whether an experience is good or bad. *Experience Design* recognizes this by embedding customers into the entire design process, starting by understanding who they are, then generating and testing ideas alongside them, and finally tweaking solutions based on their input.
- **Focus on developing solutions, not just solving problems.** Instead of framing a challenge through the lens of a problem that needs to be solved, *Experience Design* is all about using creative and critical thinking to explore new ideas for solutions that deliver value to customers.

COMPONENTS OF AN *EXPERIENCE DESIGN* METHODOLOGY

To understand how companies can implement an *Experience Design* methodology across their organization, Temkin Group interviewed a number of vendors and practitioners about their best practices for using *Experience Design*.[5] Our research uncovered that, to successfully practice *Experience Design*, employees must adopt certain mindsets and hone a particular set of skills (see Figures 2 and 3).

With these mindsets and skills in place, organizations must then follow a repeatable process. While the precise *Experience Design* process will vary between companies, we have identified six typical stages that companies follow as they flow through three generic phases (see Figures 4 and 5):

- **Phase 1) *Clarification:*** understand the objectives.
- **Phase 2) *Generation:*** explore potential solutions.
- **Phase 3) *Realization:*** share solutions with customers.

Phase 1) *Clarification:* Understand the Objectives

The first phase of *Experience Design* is *clarification*, where practitioners work to understand both the audience they are designing for and the challenge they are addressing. Here are the two stages of this phase:

[5] For this report, we interviewed AARP, Altitude, Autodesk, BlueCross BlueShield of Michigan, CA Technologies, Experience Branding, Humana, Lloyds Banking Group, McGraw-Hill Education, Primerica, Quest Diagnostics, Scholastic, TandemSeven (a Genpact Company), Thomson Reuters, and Ticketmaster.

1. **Empathize.** As the ultimate goal of *Experience Design* is to create emotionally compelling experiences for customers, this approach must be grounded in a sincere understanding of who the customers are that you're designing for. During this stage of the process, practitioners devote themselves to learning about customer needs, desires, expectations, values, attitudes, behaviors, and goals. Given this emphasis on people and their emotions, companies should not rely on quantitative research alone in this stage (see Figure 6). Instead, practitioners should immerse themselves in qualitative research, either that they themselves conduct – such as interviews and observations – or that the company has already compiled for them – such as journey maps and customer verbatims.
2. **Synthesize.** During this stage, practitioners identify and define the problem they are looking to address. To do this, they must organize and interpret the insights they've collected from customers and combine those insights with what they know of the needs and objectives of the business. Once they've synthesized all this information, practitioners should articulate a clear problem statement that outlines the challenge they are tackling. Having a well-defined problem statement is essential as it not only keeps everyone focused on the issue at hand, but also helps scope the project and allows practitioners to brainstorm more efficiently.

Phase 2) *Generation:* Explore Potential Solutions

The second phase of *Experience Design* is *generation*, where practitioners begin developing a wide-range of possible solutions to address the specific challenge they defined in the first phase. Here are the two stages of this phase:

3. **Conceptualize.** In this stage, practitioners transition from identifying problems to developing solutions. As the goal here is to generate a broad set of solution ideas, the emphasis should be on expansive thinking and brainstorming as many innovative, creative solutions as possible. Practitioners must therefore suspend their judgment and not dismiss any ideas as silly or impractical. Customers may also join practitioners during this stage, co-creating and brainstorming alongside them.
4. **Materialize.** During this stage, practitioners choose a few of the promising ideas produced in the *conceptualize* stage and build them out into inexpensive, low-fidelity prototypes. Bringing solutions to life this way allows practitioners to better communicate and focus their ideas, immediately spot any major flaws in the design, and explore the practicality of the solutions. Additionally, because prototypes are such low stakes – requiring little time and few resources – practitioners can investigate many different avenues, failing quickly and cheaply. Prototypes can take many different forms, including role-playing exercises, quick sketches, Styrofoam models, and storyboards.

Phase 3) *Realization:* Share Solutions with Customers

The third stage of *Experience Design* is *realization*, where practitioners begin introducing the solutions they've developed to actual customers and stakeholders. Here are the two stages in this phase:

5. **Scrutinize.** During this stage, practitioners bring the working models they created in the *materialize* stage to real customers to collect their feedback and observe how they interact with the prototypes. The goal of this stage is to test and validate that the solutions they've developed do indeed meet the experience objectives identified in Phase 1. While practitioners will likely start this stage with multiple low-fidelity prototypes, as they collect feedback from users, they will begin to progressively improve upon the successful designs and weed out the less successful ones, until, by the end of the stage, they've selected a workable solution. Because this stage refocuses on customer needs, it can inform the other steps in the *Experience Design* process, helping practitioners build empathy for customers, allowing them to better understand and define the challenge they're addressing, providing more sparks of inspiration for brainstorming, and ultimately enabling them to build stronger prototypes.
6. **Actualize.** Ultimately, companies need to deploy the solutions they've developed. However, deploying the new solution is not actually the end of the *Experience Design* process. The process is only truly finished when the target customers are achieving the benefits that practitioners defined for the experience. That means that even after rolling out a new experience, companies must use customer feedback and behavior to continuously refine and enhance the solution.

FEDERATING *EXPERIENCE DESIGN* ACROSS AN ORGANIZATION

When companies do use *Experience Design* to craft customer experiences, they typically restrict the practice to a few design experts responsible for leading a series of projects across the organization. Temkin Group, however, believes that companies can derive significantly more value from their efforts by distributing *Experience Design* capabilities across the entire organization. This approach is part of what we call a "Federated CX Model."[6] To propel these capabilities across the company, follow the *Federated Experience Design Model*, which focuses on three types of employees (see Figures 7 and 8):

1. **Experts.** Often housed in a centralized design team, Experts are highly trained professionals who use design methodologies as an integral part of their everyday work.
2. **Boosters.** Boosters are employees who reside in different parts of the organization and have been moderately trained on *Experience Design*, but it is not the core responsibility of their day-to-day work.
3. **Dabblers.** Dabblers are employees who have received basic training on *Experience Design*, but use it only on an *ad hoc* basis. Instead of following strict processes, these Dabblers adopt the methodology to suit their own needs.

[6] See Temkin Group Insight Report, "The Federated Customer Experience Model," (March 2016).

Experts: Highly-Trained *Experience Design* Practitioners

The first tier in our *Federated Experience Design Model* consists of employees who are Experts. Because *Experience Design* is brand agnostic, Experts play a critical role in interpreting how precisely their organization applies this approach – which processes it follows, which mindsets it embraces, which skills it teaches, and which tools it applies. Their knowledge enables Experts to take *Experience Design* out of the realm of the solely professional and translate it into something understandable and compelling to all employees, making them invaluable assets for spreading these capabilities across the entire organization. To help federate *Experience Design*, these Experts should:

- **Secure executive buy-in.** In many ways, *Experience Design* – with its acceptance of failure, encouragement of fun, and de-emphasis on output-oriented measures – represents the antithesis of what some executives believe is important for business success. Consequently, leaders often demand tangible proof of the value of practicing *Experience Design*. Given their knowledge of the discipline, Experts are in the best position to deliver that proof. For example, one of the ways Autodesk built executive support for Design Thinking was by finding leaders who were running projects that had become stuck. Trained facilitators approached these executives with the suggestion of taking a different approach to solving their problem and, with the executive's consent, would then facilitate a workshop with the executive's team. In many cases, these sessions helped unblock the team's progress, with some executives proclaiming that the team had made more progress in a few hours than they had in a few months. Today, about one-quarter of Autodesk's global workforce has now gone through Design Thinking workshops, and as a result, Design Thinking has become embedded in the company's culture.
- **Facilitate project-specific workshops.** When a group launches a project, it can be difficult for members to escape their own silos and functions and work through the challenge from the customer's perspective. *Experience Design* – with its emphasis on understanding customer emotions and journeys – can provide these groups with tools and techniques to help them overcome these silos and consider the project through the eyes of the customer. Experts should therefore hold workshops for teams kicking off new projects. For example, when teams at CA Technologies are undertaking a project that could benefit from applying the *Experience Design* methodology, the team will ask the Customer Experience Strategy and Design Group to hold a workshop for all relevant stakeholders on the project, which can include anyone from the Senior Vice President on down the management chain. Before the workshop, the Design Group will mine relevant data from the company's NPS surveying system, package it up for participants, and then send it out as pre-reading so all attendees begin the workshop knowing precisely what customers have to say about a certain topic. Once at the workshop, Experts from the Design Group coach participants on how to use *Experience Design* techniques to comb through the relevant customer journey and identify its strengths and weaknesses. They also typically introduce a couple of Design Thinking tools to open participants' minds as well as a journey mapping tool to help them view the project through the eyes of the customer.

- **Conduct in-depth customer research.** When practicing *Experience Design*, it is essential to have a rich understanding of customers' desires, needs, and expectations; however, it is not feasible to teach every employee how to conduct in-depth qualitative customer research – such as contextual inquiries, focus groups, one-on-one interviews, and ethnographic studies. Consequently, Experts should support the non-experts by managing the in-depth customer research when necessary. For example, when 3M develops new software for medical professionals, its design team works on the project alongside marketers and developers. The design team contributes to the project by conducting ethnographic studies on clinicians, traveling onsite to observe them interacting with software solutions. The team records clinicians' click paths, experiences, and pain points and reports their findings back to the rest of the team. Once a software prototype has been built out, the design team returns to the clinicians to watch them test drive the product. The team conveys the clinicians' responses to the rest of the group, who then uses their input to continue revising and improving the prototype until everyone is satisfied with the software solution.[7]
- **Participate on teams.** While Experts can teach essential *Experience Design* tools and techniques during one-off trainings and workshops, they can provide more tailored, ongoing advice if they are actually embedded into teams. For example, Scholastic placed its *Experience Design* Group inside the Engineering division – with designers working on teams alongside engineers – to help ensure that when it launches products, they are designed well and can go directly to market. Members of the *Experience Design* Group work on multiple project simultaneously and help keep their teams anchored in the customer's perspective. As part of their responsibilities, these designers conduct user testing to collect customer feedback before their teams begin serious work on development, and they manage concept testing and prototype testing once projects are underway.
- **Develop company-wide training.** As Experts are often responsible for adapting *Experience Design* components to suit their organization's particular business and brand, they are in the best position to create training programs that teach non-expert employees how to apply the company's specific process, tools, and mindsets to their everyday work. To help Quest Diagnostics build out its "Voice of the Customer (VoC) Training and Design" competency the company's Customer Experience Team looked across the organization to determine the specific skills sets and knowledge levels each group of employees needed to have in order to apply VoC to their jobs. Based on this evaluation, the Customer Experience team developed a three-tier training program. Employees who go through the Basic Training spend 15 minutes doing self-directed online work to learn about what VoC is, how it works, and where they can go to get additional help. Intermediate Training, meanwhile, consists of a 45-minute in-person open workshop during which participants learn about qualitative and quantitative research methods and how to conduct simple studies. Advanced Training is made up of smaller groups who spend three to four hours attending in-person training sessions, taking a deep dive into Quest's version of the process: set objective, define outcome, identify customers, design study, interpret data, and take action.

[7] Retrieved from https://www.3m.com/3M/en_US/design-us/all-stories/full-story/?storyid=cc832ee5-305d-448a-8df4-50f8a6637c9c

- **Provide ongoing coaching and support.** A single workshop or training session will not be enough to make employees independent *Experience Design* practitioners. To help them apply their newfound skills in their day-to-day jobs, Experts should provide ongoing support to employees who participate in *Experience Design* training. This support can manifest itself in a variety of different forms; Experts can create *Experience Design* artifacts employees can keep on-hand, build and maintain a digital platform with advice and tools, offer informal advice, or facilitate a support community (see Figure 9). For instance, as part of its Customer Experience program, BlueCross BlueShield of Michigan (BCBSM) created an effort called E4 – which aims to educate, equip, and empower employees. To support this effort, the Customer Experience team facilitates an immersive learning session that teaches employees how to apply *Experience Design* to their day-to-day work. At the end of this session, participants walk out of the room with a laminated card explaining what BCBSM's three design practices are and how to use each one. In addition, employees have access to an intranet site that houses *Experience Design* resources and examples, as well as short, inspiring podcasts that describe a design best practice from another company and explain how it relates to the employees' work at BCBSM. The customer experience team also offers attendees three levels of support: online contact for quick questions, in-person assistance for those who run into hiccups applying Experience Design, and help facilitating or leading larger projects.

Boosters: Moderately-Trained, Frequent Users of *Experience Design*

The second tier in our *Federated Experience Design Model* is made up of Boosters. These employees play a vital role in propelling this approach across the organization because they understand both the essentials of *Experience Design* and the inner workings of their own business group. Having one foot in each world allows them to explain *Experience Design* to their teams in relatable terms and flexibly adapt the methodology to their own projects. Boosters don't typically come from design backgrounds, which means companies not only need to train Boosters on *Experience Design*, they must also help them deepen and share their knowledge. Here are some key initiatives companies should create:

- **An *Experience Design* Ambassador program.** *Experience Design* Ambassador programs help cascade *Experience Design* knowledge across the organization. These programs not only teach non-expert employees how to apply this approach themselves, they equip them with the skills and know-how to share this knowledge with other employees – all while connecting them with like-minded peers with whom they can share best practices and advice. For example, in 2009 Intuit launched an Innovation Catalyst program to help ingrain its Design for Delight (D4D) principles into the company culture. These catalysts are employees from across the company who have received Design Thinking training and now spend 10% of their time coaching groups and individuals – both from their team and from other teams – on how to use Design Thinking in their day-to-day work. When other employees need assistance applying the Design Thinking principles, they will contact an Innovation Catalyst, who then helps them think outside the box, reframe their challenges, arrive at deeper innovation insights, and experiment and learn more quickly.[8] This program also

[8] Retrieved from http://www.intuitlabs.com/innovationcatalysts/

facilitates the spread of ideas, techniques, and best practices by grouping catalysts into "posses" that span business units. Since the program's inception, over 1,500 employees have taken three, five, or fourteen days of Design Thinking leadership training to become Innovation Catalysts.[9]

- **Train-the-trainer program.** Given time and resource constraints, Experts may not always be the most economical choice for leading *Experience Design* trainings. That's where a train-the-trainer model comes in. Experts can teach Boosters how to train other non-designers on the company's *Experience Design* process, tools, and techniques. For instance, to ensure it delivers a consistently positive experience to its consumers – both members and non-members alike – the AARP Experience (AARPx) team trains different groups within the organization on how to conduct consumer journey mapping sessions. The curriculum covers how to determine which consumer journeys to map, ways to adopt a consumer-first perspective prior to mapping, how to evaluate the journey once the map is complete, and ways to socialize journey findings with colleagues to improve consumer experiences. In addition to identifying pain points, moments of delight, and Moments of Truth, training participants practice analyzing the experience through the lens of the three AARP experience principles – Gets Me, Inspiring, and Effortless – to determine which moments to improve and enhance. AARPx also offers "train-the-trainer" sessions with a small subset of employees, so that going forward, when other employees have questions about how to create or implement a journey map, they have experts within their groups who can field inquires and train them in AARPx's journey mapping approach.
- **Certification program.** Certification programs are an effective way to recognize the achievements of Boosters while encouraging them to expand and apply their knowledge. IBM, for instance, uses a certification program to encourage employees to practice IBM Design Thinking, a framework it follows to solve users' problems at speed and scale.[10] IBM Design Thinking is grounded in three principles – focus on user outcomes, restless reinvention, and diverse empowered team – and consists of three process steps – observe, reflect, and make. To ensure that employees possess the necessary skills, knowledge, and experience to apply this framework to client work, IBM launched the "IBM Design Thinking Badge Program" in 2017 (see Figure 10). Any employee can participate in this program, regardless of role or discipline in the company. Participants work their way up through four badges – practitioner, co-creator, coach, and leader – by working with coaches in their region who help them learn and apply IBM's Design Thinking skills. So far more than 100,000 employees have earned a practitioner badge – the most basic badge – by completing an online course. Nearly another 2,000 have earned at least one of the three more advanced badges.
- **Immersion program.** It can be difficult for Boosters to become truly proficient at *Experience Design* if they only use it during projects where other concerns jockey for their attention. Immersion programs offer Boosters a unique opportunity to intensively apply the *Experience Design* methodology to a particular challenge or project. These programs not only give Boosters a chance to hone their skills, but when

[9] Lockwood, T. & Papke, E. (October 31, 2017). *How Intuit Used Design Thinking To Boost Sales by $10M In a Year*. Fast Company. Retrieved from https://www.fastcodesign.com/90147434/how-intuit-used-design-thinking-to-boost-sales-by-10m-in-a-year

[10] Retrieved from https://www.ibm.com/design/thinking/

they return with firsthand, real-world knowledge of how to use *Experience Design* to develop better solutions, they are better equipped to teach the approach to others. Humana, for example, created a program called "Perfect Experience," which trains employees on how to use human-centered design methods to create positive end-to-end experiences for customers. As part of this effort, Humana sends certain leaders to its "Disney PSX (Perfect Service Experience) Program" at the Disney Institute. To participate in this program, leaders from across the company nominate themselves and are sponsored by their executives. These leaders define the service experience they are looking to improve, scope the experience, and put numbers and measurements around the project. Leaders who are selected go to Disney for six months, where they apply the design principles taught by the Disney Institute to the experience they've chosen to work on. After they return from this program, Humana calls on these leaders to help it tackle other *Experience Design* issues as they arise.

Dabblers: Lightly-Trained, *Ad Hoc* Users of *Experience Design*

The third tier of our *Federated Experience Design Model* is comprised of Dabblers. All employees – regardless of role or department – impact the customer experience. It is therefore important for as many employees as possible to have at least a basic grounding in *Experience Design*. Companies should equip Dabblers with enough training to recognize and competently act upon opportunities to apply this approach – though these employees will inevitably use more generic tools, follow less structured processes, and possess fewer skills than the other two tiers. To provide Dabblers with the necessary training and support, companies should:

- **Offer open-enrollment training sessions.** One of the most effective tools companies can use to distribute *Experience Design* capabilities is an open-enrollment training session. In these sessions, non-expert employees can quickly grasp the basics of what *Experience Design* is and how they can practice it – or at least a simplified version of it – in their jobs. For example, as part of its E4 effort, which focuses on educating, equipping, and empowering employees, BlueCross BlueShield of Michigan's (BCBSM) Customer Experience team developed an immersive learning experience to train employees on how to apply its three design practices to their daily work. To identify these three design practices, BCBSM looked across industries to understand how other customer-focused companies trained their employees to deliver consistently positive customer experiences. After identifying these three practices, BCBSM launched the immersive learning sessions to spread these practices across the organization. These facilitated, small-group sessions begin by immersing attendees in a situation where they directly experience what these three practices look and feel like in a non-healthcare setting. This exposure helps attendees understand on an emotional level what it feels like when members do – and no not – experience these practices. Attendees then share what they learned during these experiences and discuss how the three practices apply to both healthcare in general and their own work in particular. Employees leave the session with notes on some concrete ways they can take what they've learned and use it in their day-to-day work.
- **Coach project teams.** While all employees should participate in generic *Experience Design* training, it is particularly powerful to teach Dabblers how to apply this

methodology to a specific project or challenge they are working on. For instance, Quest Diagnostic's Design team created a supplemental workshop to help project teams use "Think" – the company's version of Design Thinking – to create better solutions. This two-day workshop, which is being rolled out initially to members of key project teams, begins with a Design Thinking overview. The Design team then introduces an office redesign challenge, and participants go out into the building to interview other Quest employees and observe how they interact with their office space. Team members bring their findings back, and everyone shares their most notable discoveries. Based on their findings, the participants reframe the original office redesign challenge, using what they learned to clearly define the design scope. The first day finishes with an open discussion around how to apply what they learned about empathizing and scoping challenges to the specific project the team is working on. On the second day, team members build their own prototypes of a new office out of Styrofoam and other materials then go back out into the building and test their models with other employees. After they've gone through a few iterations, participants learn about how to tell a story around the design they came up with. At the end of the workshop, the Design team helps the project team start applying these "Think" concepts to their work.

- **Build online resources.** As Dabblers only periodically use *Experience Design* processes, tools, techniques, and best practices, companies should create a central repository – accessible to all employees – that contains their *Experience Design*-related materials and resources. For example, CSAA Insurance Group trains all its employees on how to use Design Thinking tools and techniques to improve the company's products, experiences, and processes. To supplement this training, the company created an online portal, called the "Innovation Hub," that houses resources like a Design Thinking toolkit, training materials, articles from innovation experts, and a list of relevant upcoming events. Through this portal, employees can also access an idea management platform, where different departments can post innovation challenges and employees can suggest, rate, and develop solutions. During the platform's first innovation challenge event, CSAA IG generated enthusiasm by posting paper light bulbs in the cubicles of employees who submitted an idea, leading to a participation rate of 80% of employees.[11] AARP's Experience (AARPx) Design team, meanwhile, is in the midst of curating a database of experiences that other companies – such as Uber, Apple, and Amazon – deliver that embody AARP's three experience principles: AARP Gets Me, Effortless, and Inspiring.
- **Create rewards programs.** Companies should recognize Dabblers for successfully applying *Experience Design* to their work. Awarding such efforts not only communicates to employees across the organization that the company is serious about following this approach, it also provides other employees – who may not think *Experience Design* is relevant to their role – with best practice examples they can follow. Every year, Humana gives out The Summit Award to recognize employees who apply human-centered design skills to go above and beyond to create the "Humana Perfect Experience." Only around 10 employees receive this prestigious award each year, and winners not only win a monetary prize and a trip to Disney, but Humana also plays a video highlighting their efforts continuously around the organization and at the

[11] Kaplan, S. (August 15, 2017). *How One Insurance Firm Learned to Create an Innovation Culture*. Harvard Business Review. Retrieved from https://hbr.org/2017/08/how-one-insurance-firm-learned-to-create-an-innovation-culture

beginning of events, such as town halls. All employees, not just those on the frontline, are eligible to win this award. For example, one recent Summit Award recipient was a digital pharmacist who applied a human-centered design approach to making prescription coverage more transparent.

- **Hold *Experience Design*-themed events.** Employees are used to leaders introducing new initiatives that they say are important, but fizzle out over time. One way companies can both convey that they are serious about integrating *Experience Design* into their operations and educate large numbers of employees about the basics of this approach is by putting on large *Experience Design*-focused events. So for instance, when Intuit first introduced Design for Delight (D4D) – its approach to Design Thinking – to the company at large, it helped familiarize employees with this new way of operating by holding a series of D4D forums.[12] These forums, which were typically attended by over 1,000 employees, showcased D4D successes and shared best practices attendees could learn from and adopt. Each forum featured a speaker, either from inside Intuit or from another company, who had spectacularly succeeded in designing delightful experiences. To ensure that employees got the most out of these forums, Intuit encouraged teams to attend together and after the event, identify one way to apply what they learned to their work. Humana, meanwhile, holds a forum every year called the "The Summit," where it brings 4,000 leaders together – both physically and virtually – to teach them about some facet of human-centered design. For example, one year The Summit centered around ethnographic research and another year it centered around prototyping.
- **Integrate into new hire training.** To ingrain *Experience Design* into their culture, companies should not just train existing employees to use this methodology, they should also make it part of their new hire onboarding process. IBM, for instance, developed a training program called "Designcamp" to teach employees its version of Design Thinking.[13] For new hires, this training lasts 12 weeks – split into two six-week sessions. During the first session they learn about a hypothetical design project, and during the second session, they split into groups of seven and discuss how they'd apply what they learned to a real project. However, to ensure that new hires do not arrive on teams with Design Thinking skills that vastly exceed the those of the current members, IBM also puts product teams through a one-week version of this training, during which they work on creating a new product or revising an existing one. As four to five different teams attend each session, participants not only learn about design and innovation, they also learn from each other. New executive hires, meanwhile, attend a one-day version where they learn IBM's Design Thinking language and frameworks to help them better communicate and collaborate with their teams.

SIMPLE *EXPERIENCE DESIGN* TOOLS TO SUPPORT FEDERATION

To build successful *Federated Experience Design Model*, you must develop a set of tools that supports all three levels of employees (see Figure 11). Which specific tools you use will

[12] Martin, R. L. (June 2011). *The Innovation Catalysts*. Harvard Business Review. Retrieved from https://hbr.org/2011/06/the-innovation-catalysts

[13] Mochari, I. (September, 28, 2015). *How IBM Built a Design-Driven Culture (and You Can Too)*. Inc. Retrieved from https://www.inc.com/ilan-mochari/ibm-design.html

depend on context, preference, expertise levels, resources, and the ultimate objective of the effort. Although we are categorizing these tools by stage, many of the tools can be used across multiple stages (see Figures 12 to 16). Here are a few examples of popular *Experience Design* tools:

- **Customer Journey Maps.** A "Customer Journey Map" (CJM) is the representation of the steps and emotional states a specific customer goes through during a period of time to accomplish a specific goal that may include some interactions with your organization (see Figure 17).[14] Because customer journey maps take a broader view of the customer's experience – beyond just individual interactions with a company – they are a valuable tool for identifying customers' unmet needs and frustrations, recognizing differences between customer segments, and spotting pain points and improvement opportunities. For example, during the updated CJM sessions at Thomson Reuters Tax & Accounting, participants develop empathy for customers by using "I" statements to articulate customers' needs, desires, goals, and viewpoints. In one recent session, this framing helped participants realize that a step they thought was only four phases was actually seven phases. As a result of this insight, they redesigned the experience to make the phases clearer and the navigation easier.
- **Customer Journey Thinking™.** Temkin Group created Customer Journey Thinking as a simple tool that allows employees to embed an understanding of customer journeys into their day-to-day work, without requiring them to commit to creating a detailed journey map or undertaking extensive research (see Figure 18).[15] To use this tool, employees must ask and answer five questions: Who is the customer? What is the customer's real goal? What did the customer do right before (three times)? What will the customer do right afterwards (three times)? and What will make the customer happy? Wolters Kluwer Financial Services, for example, uses this tool during the "Customer Experience 101" training it provides to all employees. During this 90-minute session, it conducts a small-group exercise that brings cross-functional teams together to solve a real customer challenge. Group members use the Five Questions of Customer Journey Thinking to adopt the customer's perspective, talk through the problem, and ultimately, develop solutions to the challenge.[16]
- **Experience Reviews.** Unlike customers, employees are inherently well versed in their own company's products, organizational structure, jargon, and processes. This knowledge discrepancy often blinds employees to instances when an experience might be painful or frustrating for customers. Therefore, one way to foster empathy in employees is to have them actually walk through an experience in the shoes of a customer by conducting a scenario or "expert" review. Temkin Group created its SLICE-B Experience Review Methodology to help employees systematically evaluate an interaction from the customer's perspective (see Figures 19 and 20). To use this tool, an evaluator adopts the point-of-view of a well-defined target customer and rates a particular interaction across six dimensions – Start, Locate, Interact, Complete, End, and Brand Coherence – using the SLICE-B Assessment Form. By separating an

[14] See Temkin Group Insight Report, "Maximizing Value from Customer Journey Mapping" (September 2015).

[15] Temkin, B. (May 7, 2014). Five Questions That Drive Customer Journey Thinking. Customer Experience Matters. Retrieved from https://experiencematters.blog/2014/05/07/five-questions-that-drive-customer-journey-thinking/

[16] See Temkin Group Insight Report, "B2B Customer Experience Best Practices" (November 2015).

interaction into these six components, employees are better able to find the pain points experienced by customers and brainstorm opportunities for improvement.

- **Empathy Maps.** Empathy Maps help employees develop a more visceral understanding of a target customer segment by allowing them to catalogue and group the needs of those customers (see Figure 21). While any single employee can use an Empathy Map to deepen their understanding of a specific customer, this tool is most effective when used in a collaborative setting. To do an Empathy Mapping session, first assemble a team of employees and print or draw a large empathy map. Participants should individually write down their thoughts for each section of the map on post-it notes, and then, one by one, place the post-its on the appropriate section of the map while explaining their thinking to the rest of the group. These thoughts can be based on quantitative research, interviews, observations, or prior interactions with customers. Team members should ask lots of questions and challenge each other's thinking to reach deeper insights about the target customer segment. For example, CA Technologies creates Empathy Maps on specific persona segments to uncover how those personas are likely to feel – and how the company wants them to feel – at key moments in their journey. It has identified, for instance, that after a customer signs a contract, he or she often feels acute risk and anxiety, so CA Technologies uses Empathy Maps to find ways to reduce those emotions and instead make those customers feel better informed and more knowledgeable.
- **Share-And-Capture.** Share-And-Capture is a valuable tool for communicating what each team member learned during the empathize stage and turning those insights into tangible pieces of information. To conduct a Share-And-Capture session, bring your team together after completing observations and interviews and have them, one by one, share their findings and insights. While each team member is presenting, have the others write down their thoughts, quotes that stand out to them, things that surprised them, or other points of interest on post-it notes – one idea per post-it. After everyone has discussed their findings, place the post-it notes on the wall and begin grouping them into themes and patterns. This exercise will allow the team to communicate and categorize all the information, facts, data, research, opinions, ideas, and needs they've identified in the first stage – a vital step in helping them recognize and define the challenge they'll be tackling.
- **Starbursting.** Starbursting is a type of brainstorming where team members focus on generating questions rather than answers (see Figure 22). To do this exercise, draw a six-pointed star. At the center of the star write out the product or challenge you are discussing, then label each of the six points with who, what, where, when, why, and how. For each of these six points, generate three to five questions beginning with that word. After you've developed this list of questions, try to answer them. This tool can also be used iteratively to tackle more complicated questions – just do a second Starbursting session to explore the answers to the original questions you produced. Ultimately, this tool allows you to take a systematic approach to analyzing a new idea or product.
- **Storyboarding.** Human being are naturally visual thinkers, which means we often need to see something to understand it. Storyboards are a simple and inexpensive way to communicate ideas and solutions to team members, stakeholders, and customers. A storyboard is a series of sketches laid out like a comic strip that tells a short narrative about how customers would use your solution. This tool not only

enables you share your idea with others, it also helps you refine the idea as you'll need to consider who the customer is that you're designing for, how the experience sits within their broader journey, and which moments in the story are most important. When you storyboard, focus on communicating and developing your ideas, not on creating beautiful drawings.

- **Pilots.** Pilots are used to test a new design solution – and the entire system around it – with a small group of customers right before it is launched into the market. Running a pilot helps ensure that the solution you've developed integrates well with the rest of the business, that each component works with the other components, and that it interacts well with market forces. Usually a pilot will last a few months, during which time the company will collect a great deal of customer feedback and make minor tweaks as necessary. For example, when Lloyd's Banking Group is working on building out a change that happens across the front-line and back-office, it can set up a model office – complete with front-line or back-office employees and a small subset of customers – and then implement the changes it wants to test and monitor how those changes perform live.

Process, Mindsets, and Skills of *Experience Design*

Experience Design is a repeatable, human-centric approach for creating emotionally resonant interactions

Required SKILLS:
- Observation
- Research
- Pattern Identification
- Problem-Framing
- Visualization
- Storytelling

Required MINDSETS:
- Human-centered
- Open-Minded
- Collaborative
- Action-Oriented
- Experimental

An *Experience Design* PROCESS is made up of three general phases:

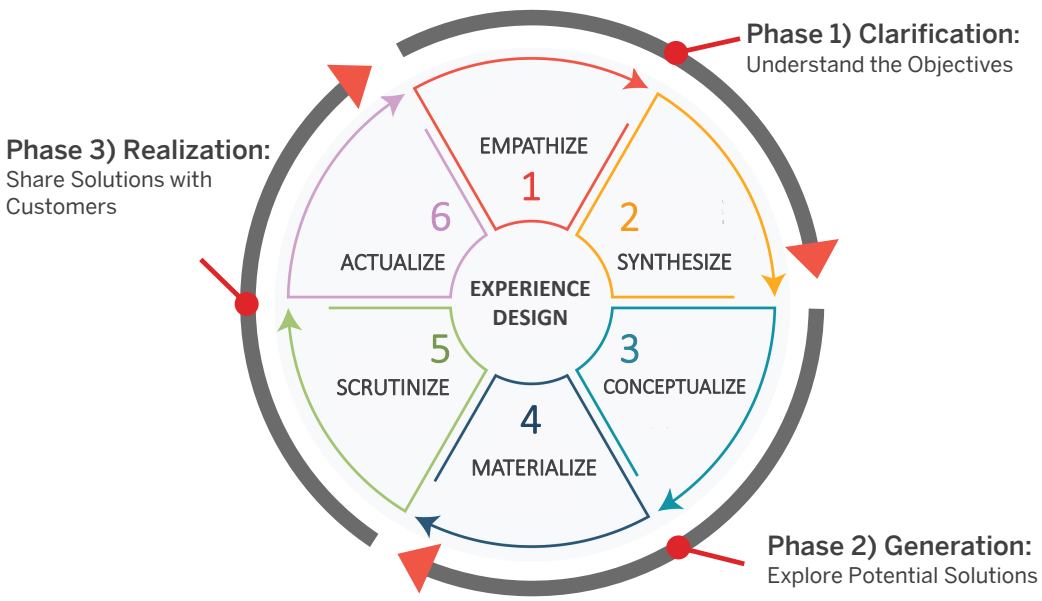

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Figure 1

Experience Design Mindsets

Mindset	Tips
Human-Centered	• Put yourself in customers' or stakeholders' shoes • Focus on emotion • Look for unmet needs • Listen carefully • Forget own biases and assumptions
Open-Minded	• Be optimistic • Look for a fresh array of solutions • Think about "what if?" – no constraints • Don't judge, no prejudice • Be curious • Stay open to the unexpected • Show willingness to learn
Collaborative	• Think across organizational silos • Collaborate externally • Develop common understanding of the challenge • Hitchhike off each other's ideas • Support each other
Action-Oriented	• Emphasize solutions, not problems • Build and test practical solutions • Break complex information down into component parts • Fail fast and try again
Experimental	• Learn through play • Embrace failure as it provides important information • Do not design towards a predetermined outcome • Question everything • Always be on the lookout for new opportunities • Take risks

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Figure 2

Experience Design Skills

Skills	Tips
Observation	• Know what you hope to learn from the observation in advance • Pay attention to people's emotions and body language • Look for hacks people come up with to make tasks easier • Note anything surprising or out of place • Observe people in the context in which they would be using a product or service
Research	• Seek an in-depth understanding of people's needs, desires, and experiences • Focus on a specific customer segment • Ask open-ended questions • Incorporate research the company has already collected • Don't start with answers already in mind
Problem-Framing	• Clearly state who the audience is and what challenge is being tackled before trying to solve it • Don't be afraid to reframe the problem multiple times as more information and insights are collected • Make sure the entire team is aligned around the problem
Pattern Identification	• Look for themes that repeatedly surface • Write ideas and insights down on post-it notes that can be easily moved around and grouped • Color code information to make it easier to recognize patterns
Visualization	• Use tools like diagrams, sketches, storyboards, posters, videos, photographs, and wireframes • Don't waste time making visuals perfect – can be rough and simple • Use visuals to communicate and identify potential design problems early • Embrace creativity • Break down problems and ideas into component parts
Storytelling	• Include important events, themes, characters, settings, and emotions • Share anecdotes, observations, stories, quotes, and pictures to connect the audience to the story • Use storytelling as a way to obtain meaningful feedback from team members, stakeholders, and customers.

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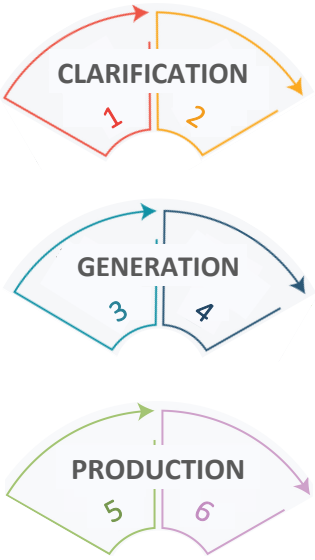
Figure 3

Examples Across the *Experience Design* Processes

AARP

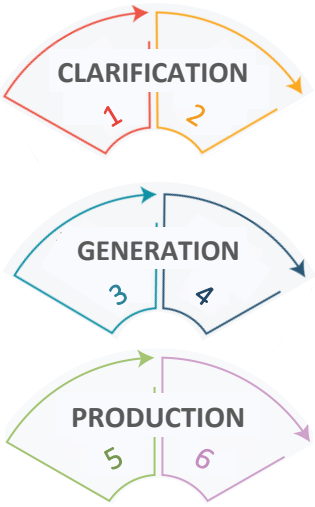


AARP's Experience (AARPx) Design team kicks off new projects with a discovery state, called "Get Smart," during which they examine what an experience currently looks like, talk to consumers about their experiences, assemble relevant best practices from other companies, and create consumer journey maps. The team also interviews internal stakeholders, such as call center employees.

The team then enters the ideation phase, where they come together to do an ideation session. The potential solutions they generate all follow AARP's three experience principles: AARP Gets Me, Effortless, and Inspiring.

The team takes the most promising solutions back to consumers to gather their input and co-create with them. They ask consumers to explain how they would navigate the new experience – which parts they would do and which parts they wouldn't. Then they bring it in house, create a general concept, and show that to consumers again, doing multiple iterations until everyone is satisfied. After the new solution launches, the team measures its NPS as well as metrics like cost savings and renewal rates.

Intuit



Intuit's Design for Delight (D4D) innovation sessions begin with a "painstorm," where participants identify the greatest customer pain point they can alleviate by observing customers in a natural context – like a home or office. For instance, to start the process of developing a new mobile app, members of Intuit's tax group went "out into the wild" to observe a number of smartphone users and quickly zeroed in on Millennials as the target customers for the product.[1]

Next, participants hold a "sol-jam," during which team members come up with a wide range of solution ideas. They then whittle those ideas down to the most viable ones for prototyping.

Participants identify and refine prototypes during a "code jam," where they write a simple version of the code to get feedback from customers. For example, after the tax group identified Millennials as its target customers, it created multiple solutions and iterated with customers weekly. They brought customers in every Friday, synthesized what they learned on Monday, brainstormed solutions on Tuesday, build the solutions on Wednesday, coded the solutions on Thursday, and brought customers back in on Friday.

1. https://hbr.org/2011/06/the-innovation-catalysts

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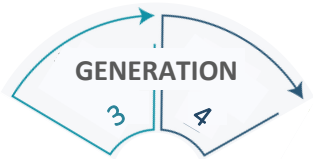
Figure 4

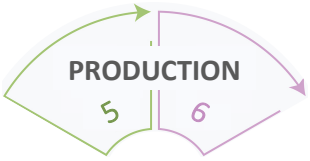
Examples Across the *Experience Design* Processes

Blue Cross Blue Shield of Michigan

BCBSM's simplified version of the Experience Design process is called "Think, Act, Check," where the first phase – Think – is about deepening understanding of internal and external clients. For instance, the insurer's CX Team ran a member panel to understand the experience of filling out a form to confirm that BCBSM is the primary insurer. The panel told the team that the original form's language was confusing, the process was difficult, and the directions were unclear.



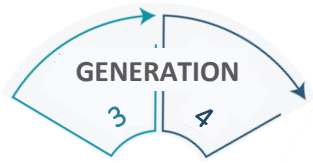
The second phase of BCBSM's process is "Act," where employees develop ways of improving the experience. In the claims form example, the team came up with lots of different options for how to word the form to make it more clear and straightforward for customers.



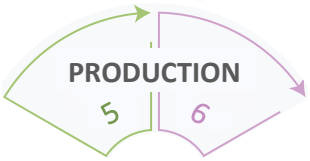
The last phase of BCBSM's process is "Check," where employees validate that the changes they've made are having a positive impact on end users. In the claims form example, after the team tweaked the letter, they would take it back to the member panel for review and then implement their suggestions. Following several rounds of iteration, BCBSM implemented the changes the team developed. It then monitored what members said about the new form during contact center calls and on surveys – as well as how behaviors changed – to ensure the new form worked as anticipated.

Lloyd's Banking Group

To build a culture that systematically delivers value to customers through digital technology, Lloyds Banking Group instituted a four-stage design process. The first stage is "Understand," where practitioners try to understand the journey from the customers' perspective through customer research and tools – such as empathy maps – and identify levers for change.[1]



The next phase is called the "Incubate" stage, which is where practitioners reimagine the target customer experience and define a plan for getting there. Once they have ideas, they prioritize which solutions to take to the next round by modeling them to determine potential customer and business value.



In the third phase – "Design & Pilot" – practitioners design and build the solution using agile methodologies. Once they are satisfied with the solution, they enter the fourth phase, "Roll-In and Scale," which focuses on industrializing the solution while continuously evolving and improving.

1. https://www.eiseverywhere.com/file_uploads/629c2cfc9d14fc24f9018561e66ccec0_Case_Study_Lloyds_Banking Group.pdf

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Figure 5

Examples of *Empathizing*

Method	Example
In-Depth Interviews Gather extensive customer feedback in person or over the phone	**Intuit**'s Turbo Tax organization wanted employees to innovate around the tax preparation business, so leadership shut down the entire group for one day and sent all 500 employees out to talk to average citizens around San Diego. Intuit provided employees with a discussion guide, and everyone talked to 3-5 people, gathering information they later used during internal workshops and strategic planning discussions.
Customer Verbatims Understand how customers feel in their own words	**CA Technologies'** Experience Design workshops are often accompanied by Voice of the Customer immersions. It finds data and verbatims from its NPS surveying system that relate to the particular workshop topic, and then before the workshop starts, it sends this compiled information out to participants as pre-reading. So when the workshop does begin, attendees know exactly how customers feel about the topic and are working from a common set of data. CA Technologies also delivers a "Customer Power Hour" where non-customer facing teams immerse themselves in VoC data to gain empathy for both customers and customer-facing employees.
Walk-a-Mile Immersion Sessions View experiences from the customer's point of view	Five years ago, **Humana** did an immersion with executives where each one had to go through an experience as a specific customer persona – i.e. put a pebble in their shoe to mimic bad circulation, wear tape on glasses for bad eye sight, or prick their finger several times a day for diabetes. Then they went through the experience of shopping on different channels and choosing benefits – some even had to be admitted to the hospital! Each exec had a "handler" who helped them capture a-ha moments. In the end they generated over 900 a-ha moments.
Customer Panels Collect feedback from pre-screened customers who are willing to repeatedly participate in feedback sessions	**BlueCross Blue Shield of Michigan** has a consumer panel that's freely available to all employees. Whenever employees want customer input – like, say, at the beginning of a new project – they can directly access panel members to pose questions to and gather insights from these customers.
Ethnographic Research Observe and interview people in their everyday lives	During **Intuit**'s Design for Design (D4D) sessions, participants learn about customers' greatest pain points by doing a "painstorm," where team members talk to and observe customers in their offices or homes. One team working on a sales-oriented project realized that customers' main pain point was acquiring new customers – not growing business from existing customers – so they changed their product concept from "Grow your business" to "Get customers."

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Figure 6

Three Levels of a *Federated Experience Design Model*

Employee	Best Practice
EXPERTS Highly-Trained *Experience Design* Practitioners	Enlist Experts to: • Secure executive buy-in • Facilitate project-specific workshops • Conduct in-depth customer research • Participate on teams • Develop company-wide training • Provide ongoing coaching and support
BOOSTERS Moderately Trained, Frequent Users of *Experience Design*	Help Boosters build and share knowledge through: • An *Experience Design Ambassador program* • Train-the-trainer program • Certification program • Immersion program
DABBLERS Lightly-Trained, Ad Hoc Users of *Experience Design*	To train and support Dabblers: • Offer open-enrollment training sessions • Coach project teams • Build online resources • Create rewards programs • Hold *Experience Design*-themed events • Integrate into new hire training

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Figure 7

Federated Experience Design Model

Type	Description	How
Experts	Often housed in a centralized design team, Experts are highly trained professionals who use design methodologies as an integral part of their everyday work.	• Follow formal, structured process • Professionally honed skills • Dense mindset • Knowledge of a wide array of tools – even if they don't regularly use all of them • Work cross-functionally • Engagements often last weeks or months • Perform in-depth interviews with customers • Work alongside other designers • Often brought in during the beginning of big projects • Centrally located • Solutions they design span the organization
Boosters	Boosters are employees who reside in different parts of the organization and have been moderately trained on *Experience Design*, but it is not the core responsibility of their day-to-day work.	• Follow a general process • Embrace XD mindsets in most work • Participate in trainings to improve skills • Knowledge of a few simpler tools that they use regularly • Usually work within their own team • Often only ones on teams trained in XD, bring customer perspective into projects • Are ambassadors of XD to the rest of the organization • May earn XD certification
Dabblers	Dabblers are employees who have received basic training on *Experience Design*, but use it only on an ad hoc basis. Instead of following strict processes, these Dabblers adopt the methodology to suit their own needs.	• Follow simplified process, rules of thumb • Knowledge of a few, very basic tools that can be deployed quickly • Uses XD to solve low hanging fruit issues • Engagement often lasts a few hours or days (workshops, meetings) • Looks at customer information the company already has (from VoC program, CJMs, etc.) • Solutions they design fix small-scale problems

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Figure 8

Means of Providing Ongoing Coaching and Support

Support Materials	Example
Experience Design Artifacts Create simplified tools employees can use to apply Experience Design to their jobs.	After employees go through CJM training at **AARP**, they receive templates and tools to support them in their own journey mapping. These tools include a training guide and a set of personas as well as templates to document the journey map, moments that matter, and recommendations. The design team at **Quest Diagnostics** has created an Empathy Field Guide – a handy booklet that workshop attendees can use to help them remember what empathy is, how they should focus on it, and how to create an empathy map. It also provides tips and tricks for observing and interviewing customers.
Digital Platform Build and maintain a site to house advice, tools, and best practices that employees can tap into.	After employees complete **Autodesk**'s Design Thinking (LUMA) training, they have access to LUMA's digital platform that houses all of the company's Design Thinking materials, including information about different tools and methods, suggestions for applying what they learned, and even information on how to facilitate workshops themselves. For example, the site describes design methods in terms of ingredients in a recipe and coaches employees on how to chain these tools together to address their business need.
Informal Advice Be available after training to field employee questions about applying Experience Design to their work.	**BCBSM** gives Immersion Workshop attendees a folder that contains the information of an expert on the CX team whom they can call for assistance with or feedback on using Experience Design. This way, employees who are unsure how to apply what they learned to their jobs can easy get in touch with an expert for advice or to bring them in to lead a project.
Grassroots Community Connect employees who have gone through training together to offer each other coaching and advice.	**Autodesk** facilitates connections between employees who have completed their Design Thinking training. It provides a number of Slack channels dedicated to the topic, so employees can solicit advice, share best practices, and connect with colleagues in their region who are also exploring design. Autodesk also holds monthly physical meet-ups where people can get together, like at a lunch, and talk about how they are using Design Thinking. The meet-up could center on a project that successfully used Design Thinking with a Q&A session, it could be about digging into a particular method, or it could focus on another aspect of design. These communities have encouraged non-expert practitioners to help each other out, creating a grassroots movement around Design Thinking at the company.

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Figure 9

IBM Design Thinking Badge Program

Badge	Description	Requirements
	The **Practitioner Badge** earner has acquired knowledge of applying IBM DT and its value. As a Practitioner, the badge earner finds opportunities to try it out in their every day work.	• Completed an online IBM DT Immersion Program or participated in select, Chapter-sponsored classroom-based workshops • Able to discuss and apply basic IBM DT concepts • Able to identify opportunities to apply IBM DT • Awarded when completed online program or workshop • So far 112,376 badges have been issued
	The **Co-Creator Badge** earner is an active contributor on IBM Design Thinking engagements. They help bring real-world user outcomes to life by growing collaboration skills and finding opportunities to step up and lead.	• Has demonstrated the ability to knowledgably discuss benefits of IBM DT with colleagues • Able to show the integration of IBM DT into all aspects of daily work • Has shared own personal experience driving to outcomes with IBM DT • Has satisfied publishing standards • Recognition by IBM DT University Chapters • So far 1,477 badges have been issued
	The **Coach Badge** earner supports and helps to lead the IBM DT effort on their teams, designing the approach, running plays, and helping the team play the Design Thinking Game	• Experienced practicing all of the Design Thinking Principles • Has led and mentored groups in the practice of IBM DT on diverse projects and workshops • Has created shareable documentation (case studies, blog posts, etc.) describing an outcome achieved through DT • Has satisfied publishing standards • Invitation by IBM DT Enablement team • So far 371 badges have been issued
	The **Leader Badge** earner helps the company apply DT at the speed and scale of modern enterprise demands, helping teams form intent and deliver outcomes.	• Mentored Collaborators and Coaches on the path to higher badges • Has driven measurable organizational change in a local environment • Has prepared and led entire workshops, playbacks, and projects using IBM DT • Has satisfied publishing standards • Validation performed by IBM DT Chapters • So far 126 badges have been issued

https://tinyurl.com/yb98ekg9

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Figure 10

Tools Across The Three Levels of Employees

	Experts	Boosters	Dabblers
Complexity of Tools	Can learn and master a wide array of complex tools	Can learn number of somewhat complicated tools	Learn to apply a few simple tools
Frequency of Use	Frequently	Regularly	Ad Hoc
Scope of Use	Large projects	Small projects	Daily activities
Application of Tools	Use tools for transformational, cross-company changes	Use tools within their group's projects	Use tools whenever they see an opportunity
Training and Support	Industry experts and vendors provide training	Experts provide training	Experts and Boosters provide training

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Figure 11

Tools for *Clarification: Empathize*

Tool	How	Why
Customer Journey Maps	A "Customer Journey Map" (CJM) is the representation of the steps and emotional states a specific customer goes through during a period of time to accomplish a specific goal that may include some interactions with your organization.	• Identify customers' unmet needs and frustrations • Recognize differences between segments • Spot pain points and opportunities
Customer Journey Thinking™	To use Customer Journey Thinking, employees ask and answer five questions to help them actively consider why customers are interacting with the organization and how these interactions fit within their broader set of objectives and activities.	• Embed understanding of customer's journey into day-to-day work
SLICE-B Experience Review Methodology	SLICE-B is an experience review methodology where an evaluator reviews a scenario from the point of view of a well-defined target customer. Evaluators use a SLICE-B Assessment Form to rate an experience across six components (Start, Locate, Interact, Complete, End, and Brand Coherence).	• Evaluate an experience through the eyes of a particular customer • Identify flaws and obstacles in an experience
Empathy Map	An Empathy Map is a collaborative tool that helps generate empathy for a target customer segment by cataloging and grouping customer needs.	• Develop empathy for customers • Build a common understanding of a target customer's desires and needs
Contextual Inquiry	Contextual Inquiry helps researchers understand the context in which customers use products by first asking them a set of standard questions and then observing them while they work in their own environment.	• Observe and interact with customers in a natural environment

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Figure 12

Tools for *Clarification: Synthesize*

Tool	How	Why
Share-And-Capture	Following interviews and observations, each team member shares what they found in the form of stories and notes. While one team member is sharing, their teammates write down interesting insights or quotes on post-it notes. One major insight per post-it note. At the end of the session, team members place all these post-it notes on a wall.	• Learn what team members saw and heard • Turn observations into tangible pieces of information • Understand customers in relation to your challenge
Affinity Clustering	Sort post-its with findings into groups. Name the groups and rank them in terms of importance. Look for patterns and themes between groups to identify insights, opportunities, and pain points.	• Explore patterns and themes • Categorize information, facts, data, research, ideas, opinions, needs, etc.
Design Principles	To generate Design Principles, look at underlying themes in post-it notes and identify the core principles under those themes. Then turn those principles into short, imperative statements that describe the rules your ultimate solution should follow, such as "Use clear, simple language."	• Keep future iterations consistent • Capture guidelines for solutions
Feedback Capture Grid	Draw a 2x2 grid to capture feedback from customers. In the upper left quadrant, fill in insights that are good or notable. In the upper right quadrant, fill in constructive criticism you received. In the lower right quadrant, fill in ideas the conversations sparked, and in the lower left, fill in questions the conversations raised.	• Capture feedback systematically

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Figure 13

Tools for *Generation: Conceptualize*

Tool	How	Why
Starbursting	Starbursting is a type of brainstorming that generates ideas by asking questions rather than coming up with solutions	• Understand all facets of an idea more fully • Generate ideas
How Might We...? Questions	Reframe themes and insights from Synthesize phase as, "How might we..." questions. Once you've generated those questions, start brainstorming a variety of solutions to address them. To produce meaningful ideas, keep questions specific enough to constrain answers but general enough to explore a wide range of ideas.	• Provides framework to launch brainstorming session • Turn themes and insights into opportunities for solutions
Round Robin Brainstorming	A Round Robin brainstorming session begins with team members writing their own ideas down on an index card. Members then pass their card to the person next to them, who uses those ideas to come up with another idea. Cards are passed circularly around team members. At the end, cards are collected and ideas are collated and discussed.	• Generate ideas and inspiration • Ensure everyone's ideas are heard equally
Mind Mapping	Mind mapping helps generate, visualize, organize, and categorize ideas, allowing you to more easily see patterns and connections between them. At the center, write a single idea or challenge and then around it, write down related topics with a line connecting each topic to the main idea. Around each topic, add branching sub-topics. Each branch should connect to the main idea and should be color-coded.	• Represent how ideas are related to a central idea and each other • Find patterns in large quantities of data

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Figure 14

Tools for *Generation: Materialize*

Tool	How	Why
Storyboards	Use Storyboards to visually plot out elements of your ideas and concepts. Storyboards are a series of sketches laid out like a comic strip that tell a short narrative about how customers would use your solution, highlighting key moments, actors, and emotions.	• Visualize and share ideas • Place solution in broader context
Role Playing	Role playing can give you a better understanding of how an idea might work in the real world by having you step into the shoes of a specific customer or stakeholder. To do a role-playing exercise, set up a small skit with other members of your team where you go through the experience or interact with the product you are designing. Make the environment as realistic as possible without spending too much time on it.	• Develop empathy • Illuminate potential emotions • Test the efficacy of a solution
Wireframes	Wireframes are a type of sketch that you can use to show the basic aspects of a user interface and task flows through a product. Wireframes are useful for quickly sharing ideas and getting feedback from team members, stakeholders, and customers. Often you will start with many low-fidelity sketches with simplified interface elements, iterate on those based on feedback, and end up with a few more high-fidelity sketches that focus on the more esoteric aspects of design – like colors and fonts.	• Quickly share ideas and get feedback
Customer Co-Creation	Customer co-creation is a form of participatory design where you bring in potential customers to work alongside you in the design process. While Experience Design always focuses on embedding customers into the design process, co-creation takes their involvement to the next level as they are generating ideas and developing solutions alongside employees.	• Reduce risk and uncertainty • Create solutions customers are more likely to emotionally and financially invest in

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Figure 15

Tools for *Realization: Scrutinize* and *Actualize*

Tool	How	Why
Live Prototype	After you have gone through several iterations of prototyping, launch a Live Prototype to evaluate how your solution performs in real-life conditions. During a Live Prototype, stress test specific aspects of your solution – such as the distribution model or the instructions. Try to make it as realistic as possible, and once you've finished the Live Prototype, gather all the feedback you've collected from customers and integrate it into your final solution.	• Test and improve isolated variables • Evaluate solution in a realistic context
Learning Launch	A Learning Launch is a hypothesis-testing experiment designed to test your underlying assumptions about a solution and whether it would be viable in the marketplace. This tool is used after you have gone through several iterations of a prototype and tests whether customers will actually purchase the solution – not just say that they will.	• Test the underlying assumptions of your solution • Minimize risk of investment and uncertainty
Pilot Programs	Pilots test not just the solution, but the entire system around it. Launch your pilot to a small group of customers and collect their feedback on the solution. Pilots usually last months and evaluate both the solution and how well it interacts with market forces.	• Test your solution in real-life environment • Find and fix problems before final roll out
Roadmaps	Roadmaps provide you with a timeline and plan for implementing your solution. To create a roadmap, gather together your team and the key stakeholders for the project and together develop a timeline, assign responsibilities, and identify milestones. Look at least 18 months into the future, and think about events like when you're going to market, when manufacturing starts, when you're reviewing customer feedback, etc. Make sure at least one person owns or champions each element of the Roadmap.	• Stay on time and on target

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Figure 16

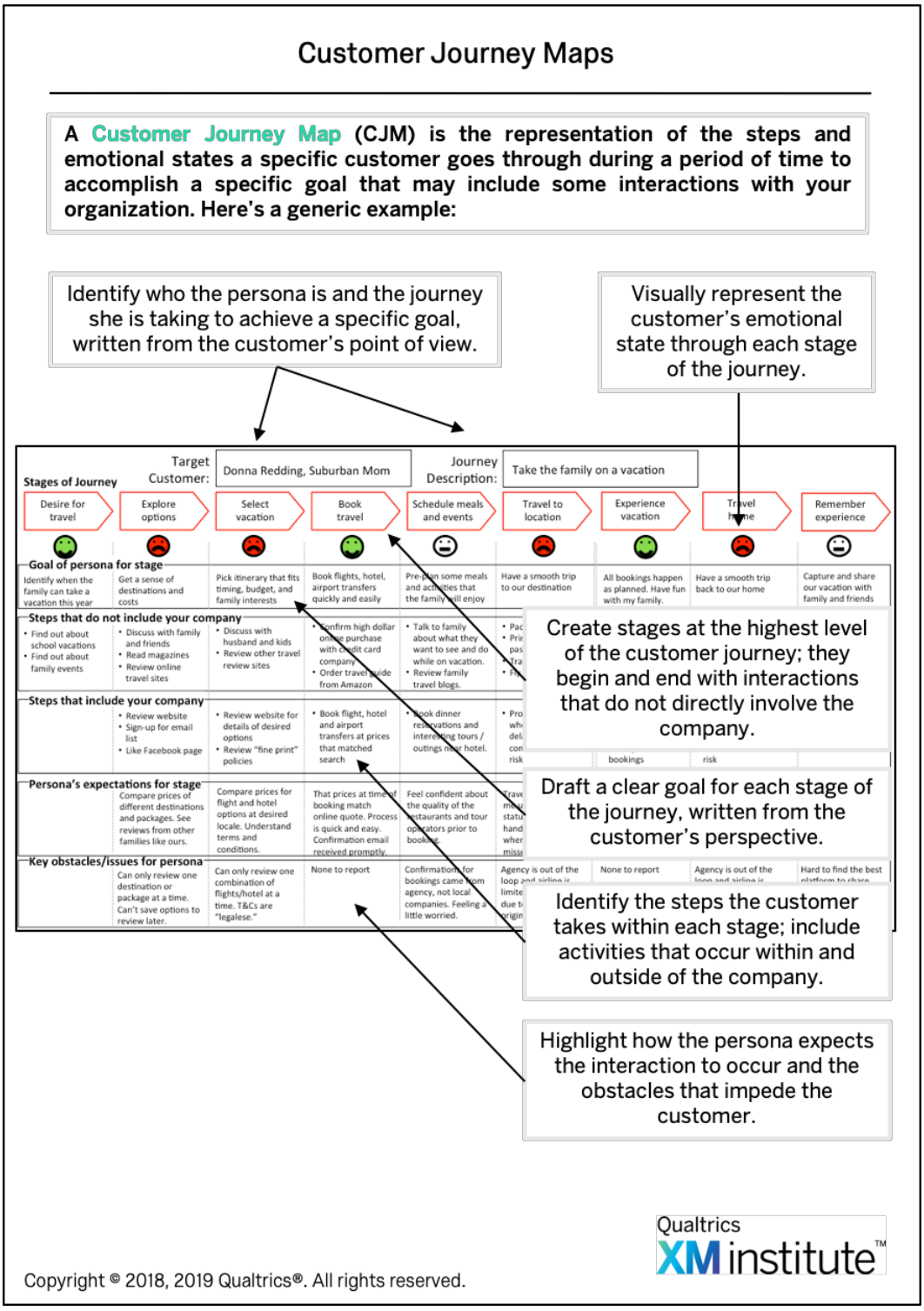
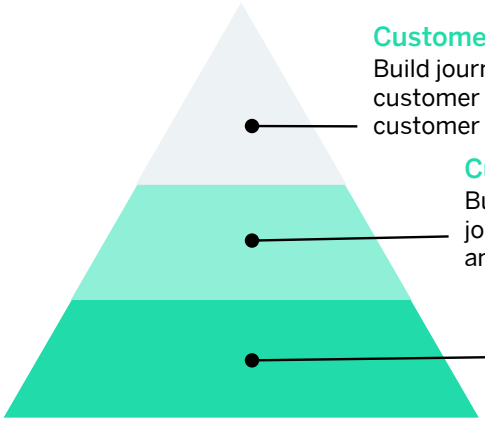


Figure 17

Customer Journey Thinking™



Customer Journey Mapping Projects
Build journey maps for a few critical customer journeys using significant customer research.

Customer Journey Mapping Sessions
Build journey maps for many customer journeys using facilitated sessions with SMEs and existing customer insights.

Customer Journey Thinking
Embed thinking about customer journeys into day-to-day decisions across the company.

Five Questions That Drive Customer Journey Thinking™

Employees should ask and answer these questions whenever working on a project that has some impact on customers:

1. Who is the customer?
Start by recognizing that different customers have different needs. It's important to understand who the person is before thinking about a specific journey.

2. What is the customer's real goal?
To understand how customers will view an interaction and what's shaping expectations, you need to think about what they are really trying to accomplish.

3. What did the customer do right before? (ask three times)
A company interaction is part of a larger journey, so you need to think about where they've been prior to the interaction and repeat the question three times.

4. What will the customer do right afterwards? (ask three times)
The customer interaction with a company is rarely the last step in a journey, so you need to think about what they do next and repeat the question three times.

5.What will make the customer happy?
Rather than just aiming to satisfy customers' basic needs, think about what it will take to provide each customer with the most positive experience.

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Figure 18

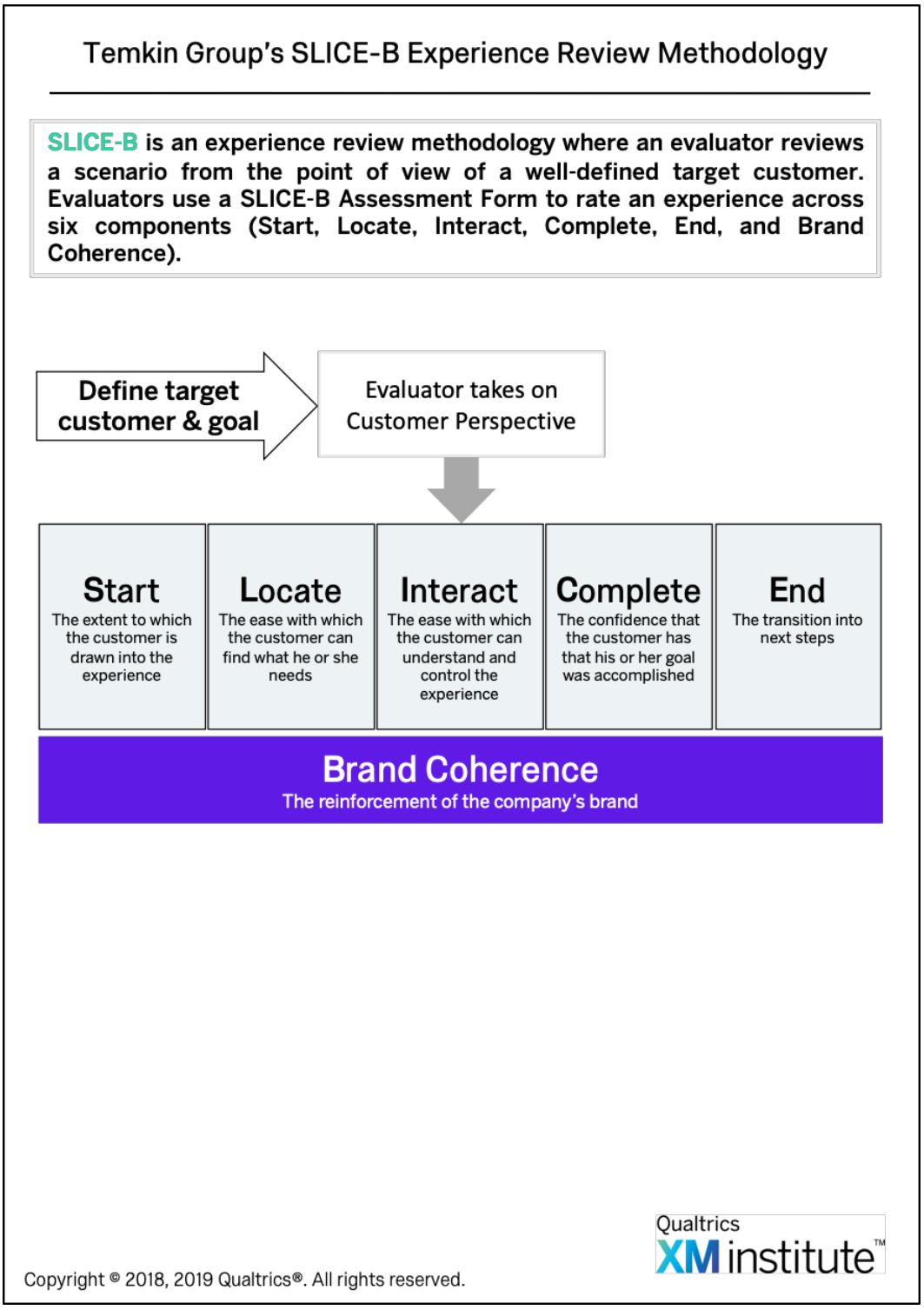

Figure 19

Temkin Group's SLICE-B Experience Review Assessment

Description of target customer:	Goal(s) customer is trying to accomplish:	Key brand attributes:

Rating the experience	+2: Definitely Yes There are no obstacles to completing goal	+1: Mostly Yes There are negligible obstacles to completing goal	-1: Somewhat Yes There are minor obstacles to completing goal	-2: Somewhat No There are significant obstacles to completing goal	-3: Definitely No Obstacles may make goal unachievable

1) **Welcoming:** Is it immediately obvious that you will be able to accomplish the goal?	
2) **Beginning:** Is there a clear path(s) to begin the process?	
START subtotal	
3) **Findable:** Is it easy to find what you need?	
4) **Available:** Is all of the information available where and when you need it?	
LOCATE subtotal	
5) **Easy to use:** Is it easy to do what you want to do?	
6) **Understandable:** Is it easy to understand the information provided?	
INTERACT subtotal	
7) **Success:** Can you accomplish what you wanted to do?	
8) **Feedback:** Did you get clear feedback that you've succeeded?	
COMPLETE subtotal	
9) **Next steps:** Is it clear what to do next; even across channels?	
10) **Emotion:** Do you feel good about the interaction?	
END subtotal	
11) **Brand values:** Are the company's brand values reinforced throughout the experience?	
12) **Brand consistency:** Are branding elements consistent throughout all experiences?	
BRAND COHERENCE subtotal	
OVERALL SCORE	

Evaluating the results	Subtotals:	Overall Score:
	<1 Poor 1 or 2 Okay 3 or 4 Good	<0 Very poor experience 0 to 5 Poor experience 6 to 11 Mediocre experience 12 to 17 Good experience 18 to 24 Excellent experience

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Figure 20

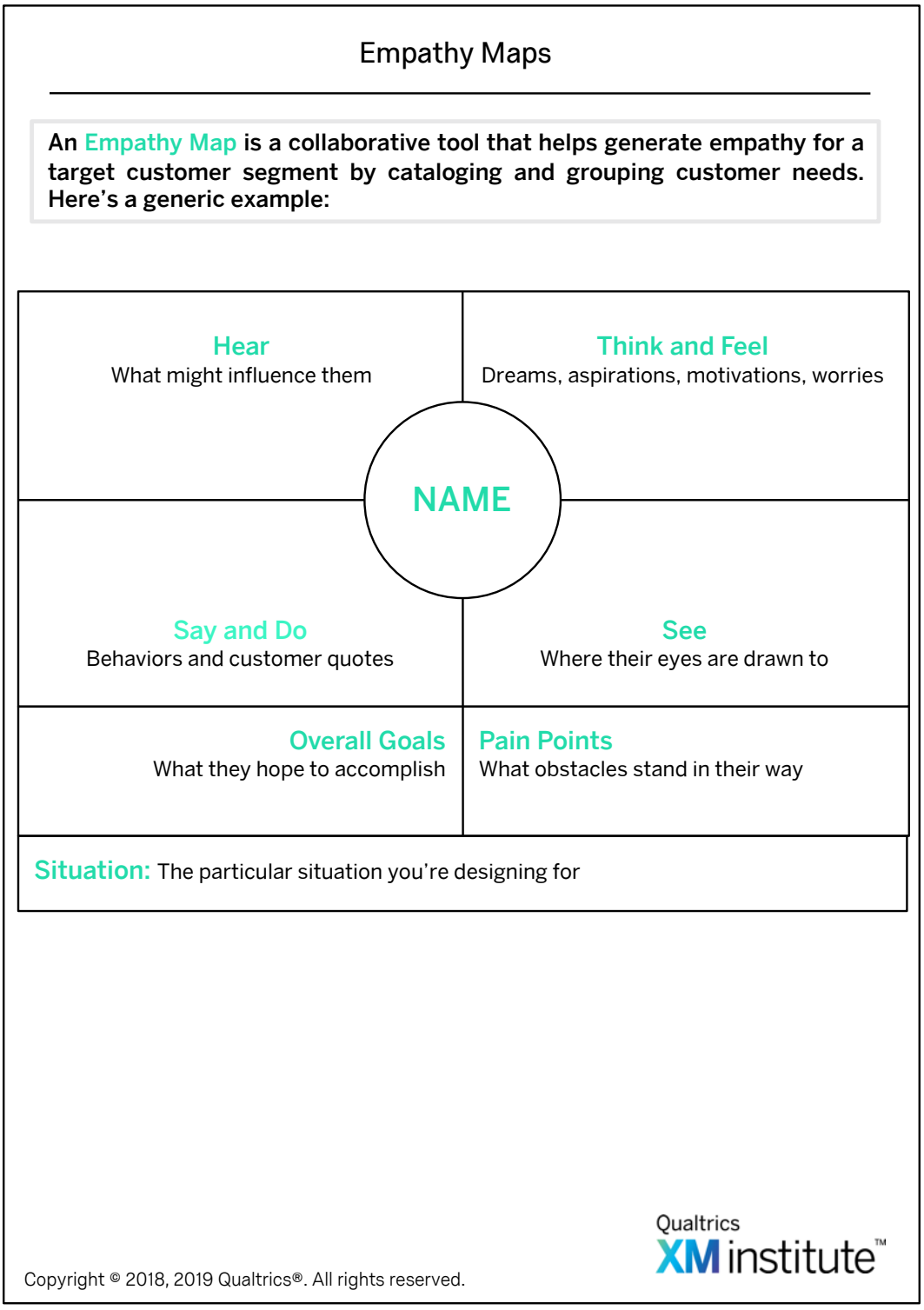
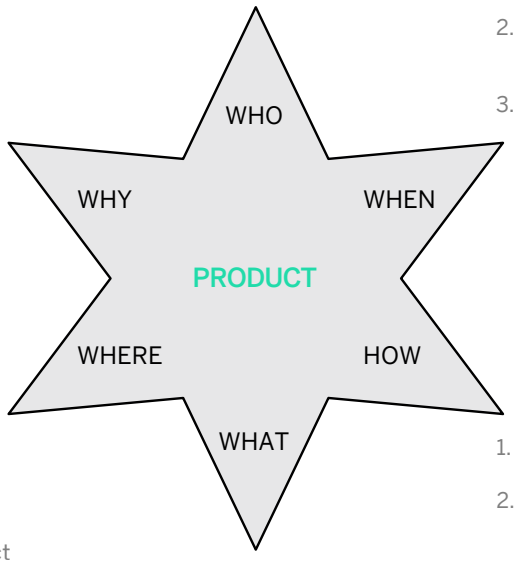


Figure 21

Starbursting

Starbursting is a type of brainstorming where team members focus on generating questions rather than answers. Here's a generic example:



WHO
1. Who is the specific customer we are designing for?
2. Who are we competing with?
3. Who is responsible for which tasks?

WHY
1. Why is this product necessary?
2. Why is this the best solution?
3. Why will customers want to buy this product?

WHEN
1. When will testing begin?
2. When will customers use this in their journey?
3. When does this need to be completed?

WHERE
1. Where will we sell this product?
2. Where will we get funding from?
3. Where will we collect feedback?

HOW
1. How does this fulfill a customer promise?
2. How will this product integrate with our other services?
3. How will it help our customers achieve their wider goal?

WHAT
1. What makes this product special?
2. What will the cost be?
3. What is the aesthetic of this product?

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Figure 22