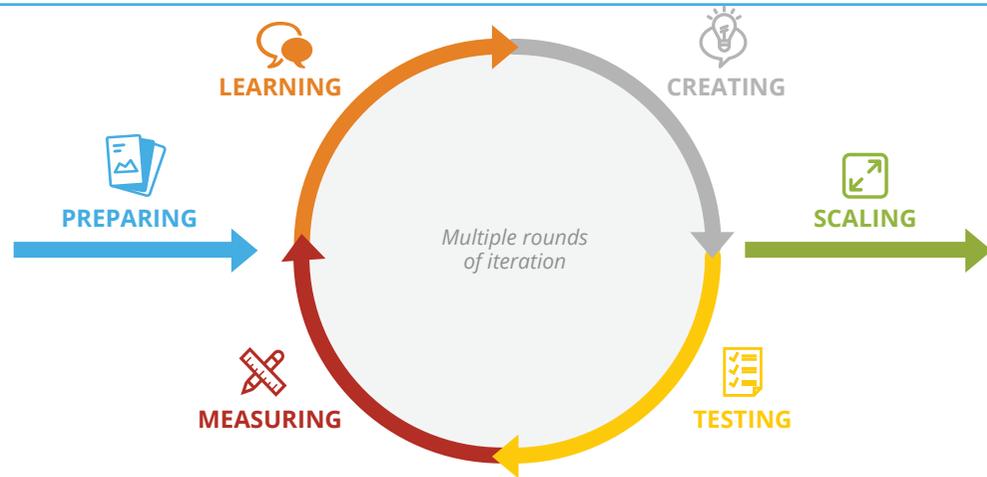


The customer experience process

The general process for developing customer experience projects is influenced by human-centered design principles, innovation techniques, and an agile product management approach. The process is iterative, not linear, and should be customized to fit your team, project needs, and capacity. Use the following framework to start your work and add the additional details if your project is more robust. Allow your team to iterate and course-correct between phases.



PREPARING

Define research objectives

1. LEARNING

Gather data internally
Choose research methods
Execute customer research
Analyze findings
Generate insights

2. CREATING

Conduct rapid prototyping
Refine and adjust prototypes

3. TESTING

Distill design principles
Generate ideas

4. MEASURING

Gather feedback
Adjust designs

5. SCALING

Implement pilot
Refine and scale up

PREPARING

The objective in this phase is to cultivate alignment and structure that allows creativity to thrive. Teams work best when they have a fair amount of autonomy in their approach to project goals, while at the same time maintaining accountability and unity as a group.

This phase starts by **defining research objectives** – key opportunity you’re investigating, as well as the expectations your process will be measured against.

1. LEARNING

Once your team is aligned around research questions, it’s critical to devote enough time to **gathering data within the organization** and clarifying what the team does or does not know. Your team can **choose qualitative and quantitative research methods** to help fill them. **Customer research** helps your organization understand gaps in your current customer experience and identify opportunities to improve it.

Gather data through in-depth household interviews, co-design workshops, field research techniques and other human-centered design methods.

After research, **analyze findings** and synthesize customer insights by clustering observations into themes and identifying patterns, opportunities, and gaps that are ripe for design. Personas or customer journey maps are useful. We recommend a process of **insights generation**, which helps transform observations into clear statements that frame research learnings and underlying behaviors in actionable ways.

2. CREATING

Next, complement your research insights with **design principles** that guide your team as they generate ideas for improved customer experience. After **generating ideas**, the team can prioritize and convert concepts into prototypes.

The output of this phase is a short list of viable, well-defined customer experience improvement opportunities that can be mocked up and tested with customers. It may be useful to engage an external facilitator or consultant, especially if your team is less familiar with brainstorming and the prototyping process.

3. TESTING

Chosen concepts go through a phase of **rapid prototyping** or real-world customer testing. This involves creating low-cost ways to test small aspects of a new offering or experience to see whether customers respond positively to changes. Your team can quickly validate (or invalidate) early designs and improve final solutions.

Co-design workshops with employees and customers may use storyboards or paper

prototypes to develop and test early ideas. To test more complex concepts, you may choose to involve external experts such as designers or fabricators. A small customer sample is usually sufficient to properly **refine and adjust prototypes** and get valuable feedback.

4. MEASURING

A prototype’s impact can be measured through formal and informal means. While informal feedback helps hone designs, formal feedback surveys help assess whether customer experience improvements added value or whether the cost-benefit analysis is positive. The process of **gathering feedback** is possible with a small samples of customers, but should usually be done by an independent professional with no stake in the outcome.

After gathering feedback, your team can regroup and **adjust designs**, entering into a new cycle of creation and testing until you’ve refined and validated a solution that’s ready to implement. Prototypes are generally not successful in their first iteration – it’s normal to undergo several rounds before identifying a scalable concept.

5. SCALING

Prototypes that have performed well over several iteration and refinement cycles can be **implemented as pilots**. These small-scale launches are actually more formalized tests with customers that, after a process of **refinement**, can be launched as formal offerings to target customers. Over time and with success, a new offering can be further adjusted and **scaled up** in new markets, locations, or delivery channels.