

What type of team do you need to be successful?

When executing a project that focuses on customers, your best work will be done as a cross-functional team. You'll need a built-in set of collaborators with whom you can brainstorm ideas, give and get feedback, and "gut check" assumptions throughout the project. Make sure each team includes the following perspectives: consumer mindset, operational savvy, financial expertise, and organizational evangelists. Two additional factors to consider are team size and working with outside contractors.

1. Team Size depends on the scope of your project, but it's best to start with a core team of at least two people from different customer-facing functions in your organization.

2. Working with Outside Contractors
What can be done internally vs. what requires an external firm? If you're unsure and budget allows, consider having at least some external assistance. Even for basic research, subtle changes in questioning technique can result in dramatically different results.

Organizational Functions

FUNCTIONAL GROUP	TYPICAL ROLE	CONTRIBUTION TO CUSTOMER EXPERIENCE PROJECT
Design	<ul style="list-style-type: none"> Designer User Experience Designer Interaction Designer Service Designer 	<ul style="list-style-type: none"> Aesthetics, visual and brand identity for products and retail environments Prototype and test new product concepts, particularly for web and mobile channels
Customer Research	<ul style="list-style-type: none"> Customer Researcher 	<ul style="list-style-type: none"> Gather and understand customer behaviors, perceptions, current product usage, desires in new products and services, experience using products, etc.
Product Development	<ul style="list-style-type: none"> Product Manager Product Development Engineer Product Architect Quality Assurance (QA) Product Owner / Program Manager 	<ul style="list-style-type: none"> Understand user behaviors, needs, and wants to create the right product Define product portfolio, requirements, and features rollout Usability of product and user journeys Understand uptake of various features

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Information Technology	<ul style="list-style-type: none"> Information Technology Manager Systems and Infrastructure Manager 	<ul style="list-style-type: none"> Manage internal technology platforms and systems, including customer data Most likely to manage internal knowledge management platform or all technology used to collect and record customer feedback
Marketing	<ul style="list-style-type: none"> Marketing Strategy Market Research Branding and Communications Digital Marketing Search Engine Optimization 	<ul style="list-style-type: none"> Define and understand target customers in the process of creating consumer value propositions (marketing messages), product pricing, market sizing, and trend scoping Smaller companies generally assume that marketing is the natural home for customer-centric initiatives
Analytics	<ul style="list-style-type: none"> Customer Data Analysts 	<ul style="list-style-type: none"> Collect customers' behavioral and transactional data Raw data doesn't provide significant value but intelligent analysis can bring valuable insights
Strategy	<ul style="list-style-type: none"> Competitive Intelligence Channel Strategy Corporate Strategy Market Analyst 	<ul style="list-style-type: none"> Conduct market and competitor intelligence on key market and competitor trends that span social, technology, and consumer
Sales	<ul style="list-style-type: none"> Sales Account Management Customer Relationship Manager 	<ul style="list-style-type: none"> Define and communicate value propositions to customers Understand customer preferences, concerns, and needs
Customer Support	<ul style="list-style-type: none"> Customer Support / Service Manager Customer Support Representative Branch Manager 	<ul style="list-style-type: none"> Handle customer feedback or complaints after sales Some companies systematically monitor customer care feedback to improve current product offerings