



Experiment 3

Take the Pulse

Learning about your customers can begin with something as simple as an email. Your front-line staff already knows where customers struggle or thrive best. Developing easy ways to take the pulse of what employees know is a great way to focus efforts early on.

STEPS

- 1** Identify a customer experience issue you're curious about and the core front-line staff who may have insight into it. Send them an email with no more than five questions to learn more about the challenge. Keep questions simple to make sure it's not a burden and ask for responses within a week. Make sure questions are specific but open-ended. Analyze responses and share top insights with relevant teammates.
e.g., "Have you heard reasons why customers aren't signing up for the mobile wallet to make weekly loan repayments? What are some of the main reasons?"
- 2** **Follow-up Activity:** To keep the conversation going, invite respondents to be a part of "Daily Conversations about Customer Experience" and share stories once or twice a week. A few things you may observe are understanding what staff knows about customer experience and if they get ideas from customers themselves on improving existing experiences.
- 3** **Follow-up Activity:** Set up a database of customer experience champions within your organization and create an internal communications channel (e.g., a blog, Tumblr, Medium, Blogger). This keeps the conversation going and gathers momentum for customer experience support across the organization. Share anecdotes, inspiration, and promising customer experience practices.

TIME	ROLES	MATERIALS
30 minutes to create an email 1 week to gather responses	1 facilitator 1 note taker / organizer	Email and shared documents Links to sharing platform if necessary (e.g., Blogger, Tumblr, Google+, etc.)

EXPERIMENTS IN ACTION: SQUARE, SAN FRANCISCO

The industry-facing initiatives team at Square, a San Francisco-based financial services / mobile payment provider, continuously talks to the customer care department to gather baseline data on customer claims and experience. With a dedicated feedback channel between teams, Square constantly prototypes ideas and gathers feedback through the customer center to test what customers find most valuable. This simple communication process allows Square to test and course-correct quickly to create the highly successful products found in their portfolio.

- | | |
|---|--|
| USE IT WHEN | USE IT TO |
| <ul style="list-style-type: none"> • You want to make the case for investing in customer experience and you need stories from customers to create a "Making the Case" PowerPoint • You want to test ways to streamline customer experience communications across functional teams | <ul style="list-style-type: none"> • Connect with people across your organization that are interested in customer experience, and recruit for Daily Conversations about Customer Experience • Test your initial assumptions on product or service performance, and gather a general understanding of challenges customers may face when they interact with your organization |

"A lot of the ideas and prioritization come from the support channel. We work closely with our support team to understand the highest frequency of request coming in from the [customer] base and then how do we build a feature or product to meet their need." Ginger Baker, Square, San Francisco