



Customer
Experience

Action Planning: Ensuring a Smooth Transition to Process Improvement



You've just completed an experience design initiative, and your organization is energized. You have a better understanding of your customers' needs and wants, and you've identified solutions for improving customer experience. So how do you make the transition to implementing those solutions? The reality of achieving organization-wide improvements can be daunting.

Who are the right staff to implement the solutions? Which solutions should be implemented first? How do these solutions align with business goals? How do you measure your efforts?

Effective action planning can help answer these questions and ensure a seamless transition from journey mapping to action plan implementation. Key considerations include:

- Involving the right staff in problem resolution
- Collecting the right information to solve a problem
- Vetting solutions with customers

Involving the Right Staff in Problem Resolution

At ICF, action planning starts with a workshop that allows staff from different disciplines, who otherwise may not work together, to collaborate and cross-pollinate. The approach dissolves siloes and enables staff to contribute creatively to solving problems outside their typical day-to-day activities.



Workshop participants should include employees from a variety of departments, specifically those with the most customer interaction in areas identified as pain points. Participants should also include individuals from each level of the organization's hierarchy to ensure consideration of diverse perspectives.

With the right people at the table, employees can brainstorm solutions that are realistic for the entire organization's operations.

Collecting the Right Information to Solve the Problem

Most problems have more than one solution, so it's important to think through each option practically and evaluate the level of effort to implement.

A good first step is brainstorming on all possible solutions to a problem, then plotting each one on an impact-effort matrix to help identify quick wins. Dot voting can help prioritize further. Once the team has narrowed its focus, it's time to develop an action plan that captures detailed information about the problem you're solving. The plan should include objectives, strategies, tactics, resources, timing, and metrics for the pain points you're trying to alleviate. Other information can include barriers, risks, and alignment with business goals.

Ensure strategies are realistic—what pain points can be addressed with existing business goals, budget, and staff bandwidth—and include a mix of quick wins and longer term investments. Quick wins are high impact, low effort solutions that can be implemented immediately to alleviate customer frustration.

Through collaboration of cross-functional areas, a carefully considered, comprehensive action plan can be handed off to the implementation team to execute with few questions.

Vetting the Solution with Customers

The key to giving customers what they want and need is to ask them directly and include them throughout your process. Think of customers as a partner and utilize them as a sounding board before committing to the substantial effort of organizational improvement. Customers can help to fine tune your ideas and suggest more effective communication channels.

After this market research, you should revisit your action plans and refine as needed. Re-connect with the team that contributed to developing the action plan to share insights from the research, review the refined action plan and ask for their support moving forward. Put on your project management hat and offer your support by scheduling checkpoint meetings, ensuring team-wide communication, and addressing barriers to success.



Case Study

ACTION PLANNING IN PRACTICE

Let's look at a hypothetical situation, but a common issue facing organizations – low program enrollment due to unclear communication. Let's say that through journey mapping and market research, your organization has identified that customers are confused and frustrated by the lack of consistent and accurate information obtained through Call Center Reps (CCR) about enrolling in a new program called "Visitors Welcomed."

You choose to address this pain point and its effect on program enrollment during an action planning workshop.

Individuals who could help to solve this problem and are invited to the workshop include:

- **Program Manager**—runs the program in question and is the subject matter expert on how enrollment should occur.
- **Call Center Rep (CCR)**—interacts daily with the customers and can describe the actual problem through experience.
- **Call Center Manager**—understands the broader needs, expectations, and goals of the department with ultimate responsibility for implementation and oversight of the solution.
- **Marketer**—develops the script to guide CCRs through explaining the enrollment process, ensures CCRs are using vocabulary customers will understand, and aligns the CCR script messaging with program info across all channels.
- **Web & Social Manager**—implements necessary updates to the website content to ensure new messaging is launched in concert with the CCR script, tracks web activity, and ensures message alignment with social channels.
- **Staff Education Specialist**—identifies and implements the training for call center staff.
- **Quality Manager**—ensures that calls are handled smoothly and issues dealt with in a specified time frame.

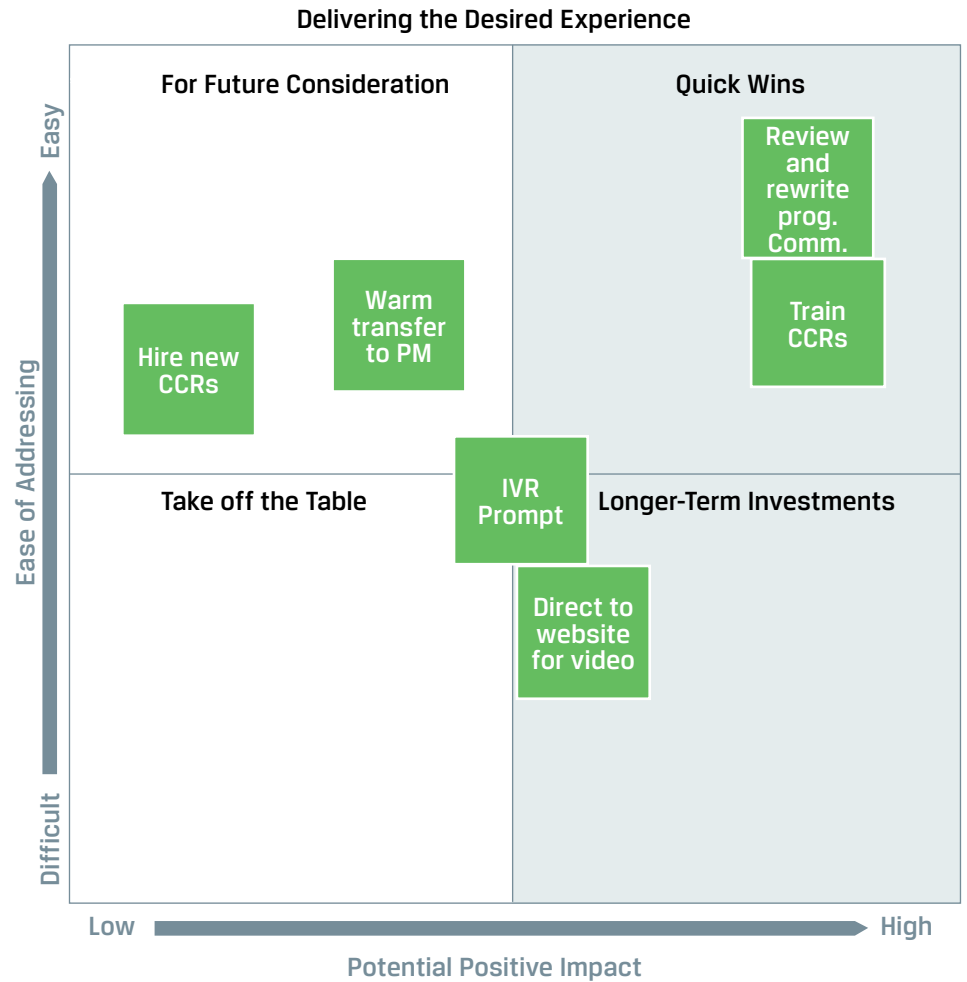
During the workshop, the team brainstorms several solutions including:

1. Have CCRs direct all customers to the website to watch a video on program enrollment.
2. Add program enrollment as an option to the interactive voice response (IVR) system.
3. Have CCRs transfer questions to the program manager.
4. Train CCRs on a new script to use when answering questions.
5. Review all program communications for inconsistencies in program info.
6. Hire new call center staff with a proven track record of stellar customer service delivery.



An impact-effort matrix for this exercise is created for these solutions based on the level of effort to implement and impact on customer experience:

PAIN POINT: INCONSISTENT PROGRAM INFORMATION



The matrix helps the team focus their ideas to quick wins (Solutions: Review communications and Train CCRs), so they create the following action plan and roadmap to better develop their ideas and determine the feasibility of execution:

PAIN POINT: INCONSISTENT MESSAGING IN PROGRAM INFORMATION

Objective				
<p>Increase the number of customers who successfully enroll in "Visitors Welcomed" program by 20%</p>				
STRATEGIES, TACTICS				
<p>Educate CCRs about program enrollment</p> <ul style="list-style-type: none"> Write script about program for CCRs to follow Write FAQ about program as a quick reference guide for CCR Develop a training curriculum for CCRs Must accommodate for frequent turn over in the department and CCRs lack of availability for the training <p>Ensure program content is consistent across all communications channels</p> <ul style="list-style-type: none"> Inventory all "Visitors Welcomed" communications to verify accuracy of content and consistency of messaging; rewrite materials to align with new CCR script and FAQ 				
OWNER+PARTNERS				
<p>Marketing, Web Manager, Staff Training, CCR Manager, QA</p>				
Timeline (add units – e.g., quarter or month)				
Q1	Q2	Q3	Q4	
Inventory program communications				
Rewrite program info				
Deploy new content by channel				
Develop curriculum for CCRs	Conduct CCR training		Refresher training monthly	
Resources				
<p>Identify resources needed—budget and personnel</p> <p>Depending on Marketing's bandwidth, may need to hire freelance copywriter to review existing content and write new scripts</p>				
Metrics For Success				
<p>How will you measure your actions? How will you define success? Be specific.</p> <ul style="list-style-type: none"> Metric _____ Number of calls to Center wanted "Visitors Welcomed" information. Metric _____ Automated survey after speaking with CCR to gauge whether questions were adequately answered. 				



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Better Engagement is Within Reach

Understanding your opportunities for an improved customer experience is not enough. You need a realistic action plan, a team prepared to implement the plan, and a champion to shepherd the plan through to completion and measurement. Effective communication and collaboration within your organization will enhance your customer experience initiatives and lead to more satisfying journeys for your customers.

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