



# Integrating Great Customer Experiences with BPM

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**MWD Advisors** is a specialist advisory firm which provides practical, independent industry insights to business analytics, process improvement and digital collaboration professionals working to drive change with the help of technology. Our approach combines flexible, pragmatic mentoring and advisory services, built on a deep industry best practice and technology research foundation.

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## Summary

**Knowledge is power, and customers have more knowledge than ever**

Competitiveness based on product /service price or features is increasingly unsustainable. Competing effectively means considering broader customer experience issues.

In the past, customers had to come to you in ways you specified, because you had the information that could help them get what they wanted. Now, information is everywhere. Customers don't have to engage with you in ways that you specify, and they don't want to.

You have to go where customers want to be, and you have to engage with them in ways that make sense to them.

**There's a "hierarchy of needs" to fulfil to deliver for customer experience excellence**

The foundation of delivering a great customer experience is to deliver consistency and continuity of service – across brands, venues, channels and so on.

The second piece, which builds on the foundation of consistency, is to make it easy for customers to work with you.

The third level of our hierarchy of needs is about "going the extra mile" – which is about being prepared to not only integrate and pull capabilities to the front edge of your organisation where they can be presented to customers; but to actually make customers part of your processes – to open up key processes to customers in selected ways that allow them to act as peers to internal people and systems.

**BPM is the foundational ingredient you'll need to bring everything together**

BPM is a central enabler of great customer experiences – it acts as the engine for addressing all three of those levels in our "hierarchy of needs".

Effective BPM combines process improvement techniques with business process automation technology to create 'systems of co-ordination' that manage and improve knowledge about 'what works in work'; and apply this knowledge to directly co-ordinate and measure work in day-to-day business operations.

## The customer experience imperative

### Knowledge is power, and customers have more knowledge than ever

It used to be so easy: customers learned about products from suppliers' in-store personnel, newspapers and magazines and their friends. If you wanted to buy something, you ordered it over the phone or went to a store to make the purchase. If you had a problem, you called the supplier or went back to the store. The balance of power was very much in favour of suppliers.

Over the past decade the explosion in use of the World Wide Web – in multiple forms, across multiple networks and from multiple kinds of device – has shifted the availability of knowledge, and the balance of power that goes with it, very strongly towards the customer. In our industry research, time and again we hear organisations tell us that many customers come to purchase a product or service armed with more information than sellers have themselves! This knowledge shift has started to create big changes in customer research and buying cycles, and as a consequence any organisation trying to sell products or services directly to customers now has to reassess how they engage and service customers' needs.

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You have to go where customers want to be and engage with them in ways that make sense to them – across multiple online and off-line channels and venues. Why? Because globalisation has put an end to sustainable competitiveness based on product /service price or features. Competing effectively today means considering broader customer experience issues. In addition, although customers are more demanding than they have ever been, it's still easier to win business with existing customers than win new ones. Showing you care about customers helps you keep them as competition intensifies.

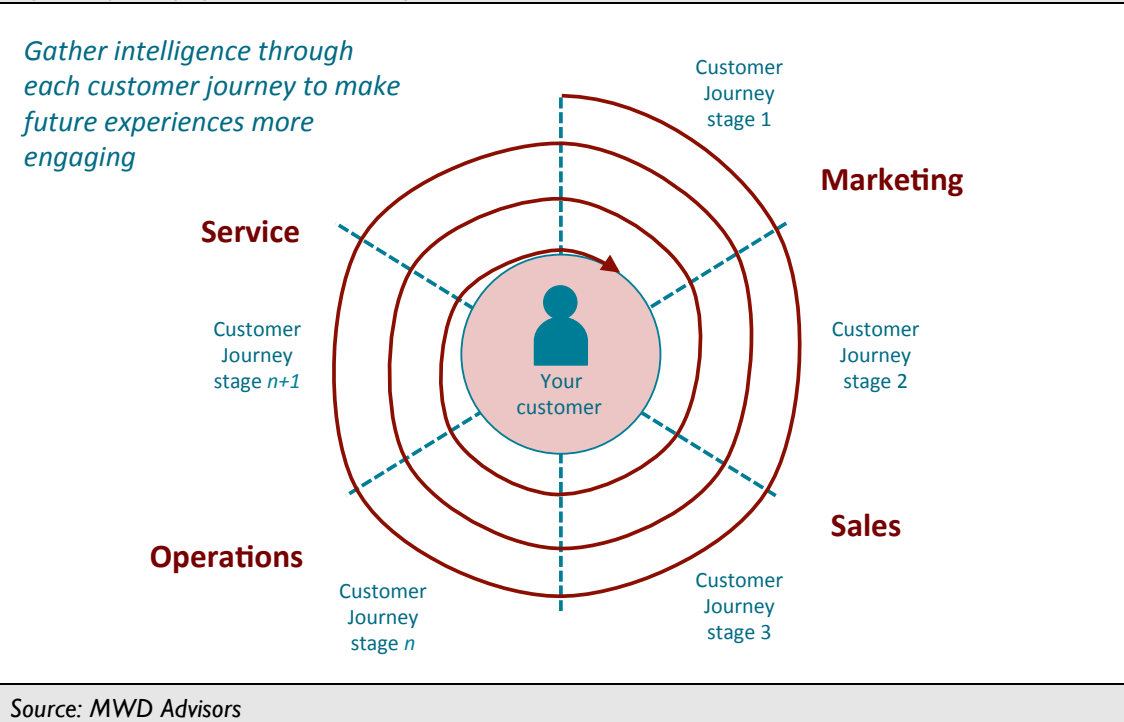
### Customer experiences and journeys

When trying to improve your customers' experiences, trying to improve isolated interaction points is only going to take you so far. What can appear to be a series of one-off interactions from your perspective is actually part of a journey from your customer's perspective – and that journey can be intensely frustrating for customers, even if individual interactions within that journey pass off without problems.

The concept of a “customer journey” is a great place to start if you want to enhance the customer experience at your organisation – understand this and you can begin to deliver great customer experiences. A customer journey can be seen as the series of touch points that a customer goes through as they seek to do business with your organisation. The idea is to map out the journey that different kinds of people will take as they seek to do business with you, and look for points in that journey where the experience breaks down from the customer's perspective.

Delivering great customer experiences means understanding that each customer journey needs to be seamless and natural – from marketing, through sales, operations and services and across those skill, management and technology silos. More than that, though: delivering great customer experiences means understanding that in order to really maximise the value you can get from a customer over time, you have to treat each journey they take as one segment of a longer-term relationship. What you learn from one customer journey, you have to find ways to apply to the next – so that you get closer and closer to that customer over time. Figure 1 shows this.

Figure 1: Joining up customer journeys



Looking back at the idea of a single customer journey, it's important to focus beyond a simple sales cycle. It's easy to do this, but the danger is that you quickly begin to slip back into inside-out thinking that doesn't put the customer at the centre of things. At a high level a typical customer journey will have four major phases, each of which will probably have multiple elements within it: **learn** (about your product or service); **buy**; **receive**; and **use**. Additionally, it pays to consider other activities that are integral to customers' end-to-end experiences and your ability to excel: **get help** (when things go wrong or the customer doesn't understand something); and **tell friends** (about good or bad experiences).

The important thing to remember as you consider the structure of a customer journey is that each journey may well traverse multiple brands, venues, and channels. It may also include interactions with third parties (one trivial example would be interactions with delivery agents).

## Poor experience, great experience

So that's the thinking behind the customer experience excellence imperative we see so many organisations pursuing. To try and bring this abstract stuff to life, though, let's compare an archetypal poor experience with an archetypal great experience.

To set things up, let's introduce Marie: she's a journalist, and her and her family have just moved to a new city. Marie has already ordered telecom, broadband and cable TV service from TelCorp. Unfortunately, though, when the family move in, the cable TV service and broadband aren't working.

### A poor experience

Marie calls TelCorp's customer service line, and is on hold for 10 minutes. When she finally gets through to a customer service advisor, John, the advisor asks her to provide her customer number and confirm her billing address. No problem.

Next, John checks his system to verify Marie's experience – but the system that John has access to doesn't surface the right level of detail. "I'm going to have to redirect your call to a colleague who can help you – please hold."

After holding a further 10 minutes, Chris from Tech Support picks up. Chris asks her to confirm her customer number and billing address.

Unfortunately, Chris can't see what Marie's problem is, either. "I'm going to have to put a call into our service provisioning specialist team Marie," says Chris. "I'll try to expedite this for you."

"How will I know when this is all resolved?" asks Marie. "You'll need to call in to check, says Chris. "Can I take a direct number for you please?" asks Marie. "I'm afraid not, Marie; you'll have to call our main number and ask to be transferred."

Three days later, the service is finally working. In this time Marie made a further four service calls – each time, having to provide the same information.

Marie is telling all her friends and social media followers about this...

### A great experience

Marie calls TelCorp's customer service line, and is on hold for 10 minutes. When she finally gets through to a customer service advisor, John, the advisor asks her to provide her customer number and confirm her billing address. No problem.

Next, John checks his system to verify Marie's experience – but the system that John has access to doesn't surface the right level of detail. "I'm going to have to redirect your call to a colleague who can help you – one moment please."

After holding for a few minutes more, Chris from Tech Support picks up. "Hi Marie, John has given me the background to your issue – let me see if we can sort this out," says Chris.

Unfortunately, Chris can't resolve Marie's problem either. "I'm going to have to put a call into our service provisioning specialist team Marie," says Chris. "I can't promise that this will be resolved today, but if you'd like I can make sure we send you SMS updates as we work on the problem. Would you like to do that?" Marie provides her number.

Three days later, the service is finally working. In the meantime, though, Marie received regular messages to reassure her of progress. Once the problem was fixed, TelCorp also made a courtesy call to apologise again for the problem.

Marie is telling all her friends and followers about her positive experience with TelCorp...

## A hierarchy of needs for customer experience excellence

Note that in the great experience story above, Marie’s problem wasn’t solved immediately; in fact it took the same amount of time for the problem to be resolved in both the great experience and poor experience stories. What distinguishes the great experience from the poor experience was how TelCorp really integrated its capabilities at the point where they were delivering service to Marie.

Now let’s ‘zoom out’ from these contrasting stories, and explore what it takes to deliver a great experience for customers. We see this as a “hierarchy of needs” layering three goals we should aim to deliver.

Figure 2: A hierarchy of needs for great customer experiences



Source: MWD Advisors

### Aim 1: Be consistent

The foundation of delivering a great customer experience is to deliver consistency and continuity of service – across brands, venues, channels and so on. In order to do this you need to find ways to ensure that everyone who interacts with a customer has consistent information, consistent authority and the right attitude.

When it comes to the right authority, this is also about representatives knowing the limit of their authority – and knowing who can help if a given situation goes outside that authority and being able to seamlessly route the issue to the right person. This alone is not trivial: it requires you to integrate policies, procedures and systems across brands, departments and channels at the “front edge” of your organisation. Sometimes those policies, procedures and systems will be tools that employees use to deliver service; in other areas they’ll actually be automated in software. Even across the software-human divide, consistency and continuity are paramount.

### Aim 2: Make it easy

The second piece, which builds on the foundation of consistency, is to make it easy for customers to work with you. Note that it’s possible to consistently deliver average experiences. Who really wants only that?

This part is really about not only harnessing the capabilities of the front edge of the organisation to service a customer, but to integrate processes and people from the front edge through core processes and right to the processes of relevant “back edge” partners – to make the transactions that customers and prospects have as seamless and intuitive as possible.

***As we saw in our poor experience example above, common approaches to responding to customer requests for information can often lead to customers being forwarded between multiple personnel for enquiries to be fully resolved, because individual service personnel don't have the right information or access to the right systems or processes. Where customers are handed off from one person to the next, they're frequently asked to repeat identifying information, case references and so on.***

Making it easy for customers is about ensuring that wherever possible, common request patterns can be addressed quickly and with little or no work repetition or handoff. It's about bringing key touchpoints with core processes and potentially even the processes of back-edge partners to the front edge – to the customer.

### **Aim 3: Go the extra mile**

So if consistency and continuity are about integrating across an organisation's front edge and making it easy is about integrating from the front edge to the back edge in order to meet the customer, what's involved in the third level of our hierarchy of needs – “going the extra mile”?

Fundamentally it's about being prepared to not only integrate and pull capabilities to the front edge of your organisation where they can be presented to customers; but to actually make customers part of your processes – to open up key processes to customers in ways that allow them to act as peers to internal people and systems (in some ways).

***Think about our 'great experience' example above. In that example, TelCorp was able to keep the customer informed proactively about ongoing progress in dealing with her problem.***

How many online shopping environments really keep customers up-to-date with the progress of orders, and notify them of any problems in a timely, customer-friendly fashion in ways that enable customers to make sensible decisions (like, for example, cancelling a delayed order?) Many of these features may seem like fringe benefits but they're all ways to really go the extra mile and potentially make all the difference for customers. And crucially, implementing them requires the realisation that customers' lives don't fit into neat “happy path” transactional boxes. It requires you to think about how you can let customer behaviour directly drive events into existing processes that lead to managed exceptions or alternative process flows.

These examples are all about embracing unplanned consumer behaviour but going the extra mile is equally applicable for B2B relationships where customers have their own preferences regarding commercial interactions and their related processes. In a B2B context going the extra mile means embracing variations in your customers' process requirements and building support for those variations into your own front-edge processes. Rather than blindly following the path of consistency to an overdone conclusion – that every customer needs to interact with you in the same way – it's about putting systems in play that can deliver consistency and continuity of service that's nevertheless personalised.

## How BPM enables customer experience excellence

Great customer experiences need to be integrated and personalised. But integrating and personalising products and services to create great experiences is tough, if you're part of a dispersed and fragmented value chain of suppliers and partners and if your own organisation is also highly distributed. Resolving this tension between distribution and integration in core business processes is a non-trivial problem. Doing it at scale without technology support is foolhardy.

You can't deliver great customer experiences without having an underlying business platform that can facilitate the transparent cross-channel sharing of customer and transaction information, and the coordination and integration of work between individuals, teams, automated systems, departments and even partners to support customers' journeys.

### What about CRM? Isn't that the solution?

You may well be thinking this already, so at this point it's worth asking the question – *where's CRM in all this?* After all CRM was supposed to fix all this. Right?

The unfortunate truth is that although CRM in theory absolutely supports all of what we've been talking about, many CRM implementations fail to support great customer experience delivery in three specific ways:

- They're often fragmented –delivered in technology and organisational silos.
- They're often limited in scope – focused primarily on addressing customer experiences in the **buy** and **get help** phases of customers' journeys.
- They're often primarily oriented around information consistency (“a single view of the customer”) and this tends to promote an inside-out viewpoint that fails to highlight the need to support variation; as well as failing to recognise the relationships between individual steps on a customer journey.

### Business Process Management ties everything together

CRM systems are a foundational component for great customer experience delivery, but they don't go anywhere near far enough. Business Process Management (BPM) is the crucial ingredient you'll need to add to create a real customer experience delivery platform for your business.

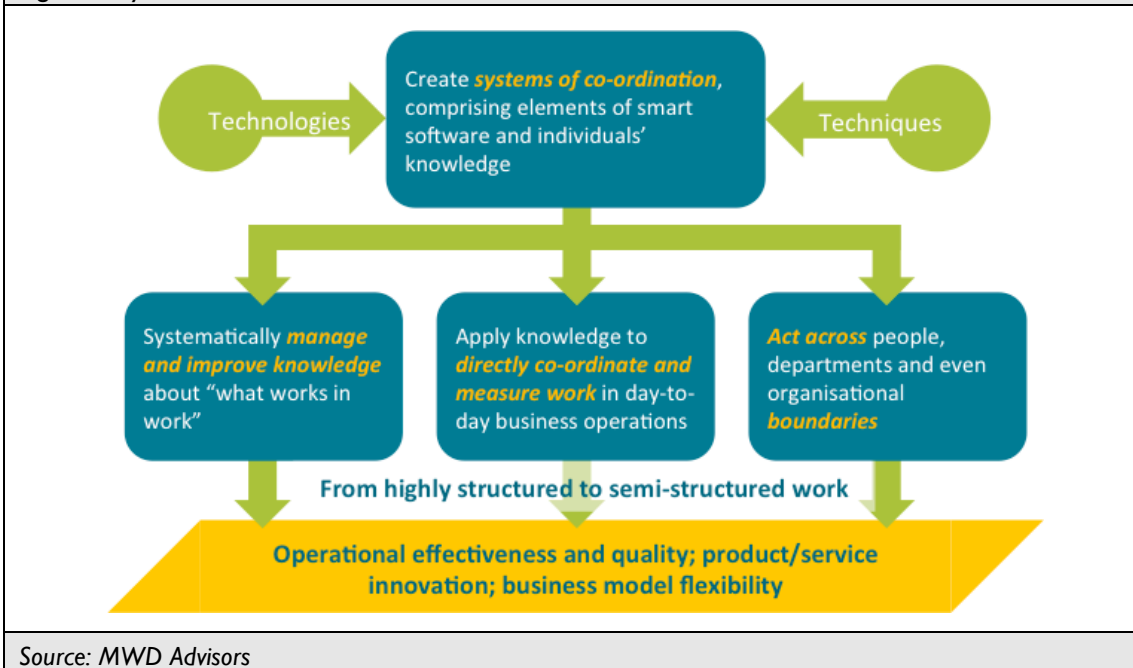
*BPM is a disciplined approach to implementing a process-oriented management perspective within an organisation that links strategy to execution, and optimises the efficiency, effectiveness and flexibility of business processes throughout their lifecycle. Effective BPM combines process improvement techniques with business process automation technology to create “systems of co-ordination” that **manage and improve knowledge about what works in work**; and apply this knowledge to **directly co-ordinate and measure work in day-to-day business operations**.*

As the definition above highlights, the aim of BPM initiatives is to create *systems of coordination* (see figure 3). These systems are comprised of technology, people and knowledge – acting together to coordinate the way that work gets done across people, departments and even corporate boundaries; and measure the effectiveness of that work over time.

In relation to CRM, a BPM investment is complementary; it enables a foundational CRM system of record to be enhanced with the ability to co-ordinate work and share information seamlessly among individuals, teams and systems – to support the needs of customers as they take their journeys through buying and using your products and services.



Figure 3: Systems of coordination



## BPM's value in delivering great customer experiences

BPM is a central enabler of great customer experiences – it acts as the engine for addressing all three of those levels in the hierarchy of needs outlined above.

At the foundation level (which is about delivering a base level of consistency and continuity of experience across channels, venues, brands and so on), the core of your approach should be to use BPM technology to integrate data and functionality across the sales, marketing or service applications (including CRM systems) you have, and enable a true single customer view that focuses beyond the confines of the sales cycle that your CRM system might manage. That's just the start though: you can use your BPM implementation to standardise core elements of customer interaction processes, to ensure that all personnel at the front edge of your organisation can act according to the same policies and procedures to ensure that customers get consistency and continuity in their experiences.

When it comes to “making it easy”, you should be thinking about implementing BPM to integrate those front-edge sales, marketing and support processes that might hook into aspects of your CRM system with processes and resources that sit further back in your organisation, perhaps working primarily with operations, administration, provisioning, accounting and billing systems of various kinds. By linking people and information across these silos you'll be able to make sure that you deliver satisfaction to customers with as little effort as possible on their part. No more passing customers unnecessarily between sales, support and other company representatives: this is about smart use of BPM systems to pull everything together for customers at the places they expect to be.

When you look at “going the extra mile”, you should be thinking about implementing BPM to enable customers themselves a degree of influence and control over how some processes unfold. You'll enable customer-driven events to be detected by your processes even when they're unexpected, and will use BPM technology to handle those events gracefully and flexibly. You'll also drive notifications out to customers in the most appropriate ways to keep customers in the loop as your servicing of their needs progresses. You may also look to extend your core, common, base process implementations to allow for per-customer or per-segment variations in certain policies and procedures – enabling, for example, a common core set of capabilities to be flavoured with unique local requirements for auditing.

## Your next move

So, how do you determine whether BPM technology is an important ingredient of the platform you'll need to deliver great customer experiences? Answer the following questions:

- Do you have turnover in your marketing, sales, customer support or service functions such that the time and effort required to train new staff on procedures and policies has led to a significant ongoing business investment?
- When staff are dealing with inbound sales, service or support inquiries, does the resolution of those inquiries need the co-ordination of knowledge of tasks across multiple teams or departments?
- In order to fulfil requests or deal with issues, do staff have to key information into multiple systems? Are there paper documents that need to be passed around?
- Do you already make, or do you want to be able to make, clear customer commitments about response service levels?
- Do you want to be able to keep customers updated about your own teams' progress in resolving issues or fulfilling services, without requiring a lot of manual work on your teams' part?

If you answer more than three of these questions positively, there's likely to be a significant case to be made for investing in BPM technology.

We end with a word of caution about the methodology you use when driving BPM to improve customer experiences.

Many BPM practitioners proceed on the assumption that the goal is to improve process efficiency/quality... this is no bad thing. But it can be dangerous in the context of customer experience improvement, if you don't scope your field of concern correctly. It's easy to start an implementation with a laser focus on customer experience, and then let the focus slip when you get into implementation of process improvements. The result can be processes that are certainly more efficient, but that don't actually lead to customers having better experiences.

The thing to remember is this: walk in your customers' shoes; start with their reality and keep returning to it.



## About Bonitasoft

Bonitasoft builds a BPM-based application platform – so it's far easier to create great business applications without the cost and rigidity of long, unpredictable custom development cycles. With Bonita BPM, developers can build truly "living" business applications that adapt in real-time to process changes, user interface updates, and even the underlying data model.

Its breakthrough User Interface Designer enables developers to create engaging, fully customized user interfaces for any application.

Bonita BPM is available in open source and subscription editions - subscriptions include extensive support, training, and advanced features to accelerate application development and secure deployments for enterprise-wide and critical projects.

With more than 1000 customers in 75 countries, and its open source community of more than 120,000, Bonitasoft is the fastest-growing provider of BPM software in the world. It maintains its R&D facility in Grenoble France and its head office in Paris, with offices in New York and San Francisco.

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