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CX EXPERT TALK

UX OR CX: THE CUSTOMER JOURNEY MATTERS

Expert interview with Hannes Robier, CEO of digital agency youspi and Chairman of the World Usability Congress

Pure focus on the user

What distinguishes the UX designer from the customer experience manager? Who has the greatest business impact on positive customer experiences? We discussed these topics with Hannes Robier who has been involved in user experience and customer experience for more than 20 years. Hannes is CEO and founder of the digital agency youspi in Graz and initiator of the renowned World Usability Congress. At this event, UX and CX experts from different industries come together for discussing the latest developments in UX Strategy, UX Engineering and UX Research on an annual basis. So Hannes is familiar with the current trends. Reason enough for us to ask him what is the best way to achieve the perfect customer experience and why a customer journey mindset is essential.

Hannes, how did you get into UX design and what is your focus with youspi?

I've been involved in UX design since 2000, when I studied information design in Graz. An initial moment which I remember is that we redesigned an old VHS recorder in our „Usability Engineering" lecture. Everyone surely still remembers the former pain points like the annoying time setting process. We approached this issue in a new way by concentrating on the user's point of view. After having finished my studies I worked for Siemens as a UX designer and then after two more positions in UX I decided to start my own business. At youspi, we are delighted to work for companies from a wide range of industries. Our focus is on developing sustainable UX and CX concepts and so our clients include leading brands like Red Bull and Philips.

User experience, customer experience and usability are often mixed up. How do you delineate these areas?

That's right: These terms are often used in a similar way. I call it marketing bingo, since many designers see themselves UX designers because the topic is trendy. What many people don't know: There is an ISO standard with a clear definition. According to this standard, "usability" is the interaction with a product or service and is very much related to the touch point. If I design an app, I am a usability engineer. "User experience" then goes one step further as it encompasses the services with which a customer interacts before and after the touch point.

Since a UX designer focuses on touch point processes and their optimization he is a process designer who combines usability and process know-how. This way, he ensures that touch points are customer-friendly. In case of the "product" touch point, for example, this includes the entire user journey with all processes from the website to the store to the after-sales activities. Unfortunately, most UX designers are not process designers but rather product designers or usability engineers. This shows that understanding is still lacking in the market.

"Customer experience" then focuses on the customer as a user. It is a special target group in the overall user experience. However, since Customer Experience is close to Sales and Marketing, it is prioritized by the market. CX usually involves the entire corporate strategy and encompasses all customer journeys and touch points thus being all activities in which a customer interacts with a company. Therefore, CX managers tend to be strategic managers. In truth, however, it is only a specific part of UX, because all customers are also users of a system. In practice, CX teams not only manage and monitor touch points and processes, they also take care of customer centricity and collaborate on branding and company story. This is one of the main differentiators to UX teams, which are working on specific products or processes.

While CX is more process-oriented, UX focuses on the usability of a touch point. (Alvaro Reyes / Unsplash)

As you can see, the areas overlap. Actually, UX and CX belong together and should merge into one „Human Centered Design" (HCD) department. From my experience, a well-established CX department consists of both CX and UX experts. Since the CX manager knows the processes and where a touch point needs to be placed, the UX designer can take care of its usability. However, most companies consist of departmental silos. And so these teams have a hard time when they want to optimize customer experiences company-wide. Therefore, I always advise that the CX or HCD team should work closely with the board or executive management. Only then the team has a chance to make a difference.

"UX and CX belong together and should merge into one „Human Centered Design" (HCD) department."

Is this approach already being implemented in companies today?

Some companies have departments consisting of both CX and UX experts. Others are working only with a UX team. From my point of view, it depends on the extent to which customer experience and customer centricity are anchored in the corporate strategy. Usually, UX designers are more with IT, because they are very software-focused. CX managers, on the other hand, are working closer with Marketing. However, separating the two areas doesn't really make sense. Because when the CX manager recommends improvement measures, he needs someone to roll them out. And that's the UX designer, who defines the touch point process, and the usability engineer, who designs the user interface.

Why should UX design matter for companies and how come that this topic is often neglected?

It is important, because a UX designer makes a valuable contribution to customer centricity. He brings in the psychological component by analyzing customer needs and transferring them into his concepts. Even though product managers and marketers often think they know the customer because the user is a human being as well, these assumptions often do not correspond to reality. Inside-out perspectives ignore what is happening on the customer side. UX experts prevent this with research. User surveys for example allow to understand what customers need. So a UX designer first puts himself in the customer's position and then starts the design project.

This is one reason why some companies struggle with UX design. Because UX projects are based on a good strategy and do not solve problems at the push of a button, although decision-makers want to see results immediately. UX design means starting at the root causes and fixing them.

In addition, some companies fear the costs of a UX department. In the end, however, such a step quickly pays for itself. Let's take the example of change requests in software development. Traditionally, this is estimated to have high costs and long development times. A good UX design team can reduce change requests to zero, because future application and user requirements are aligned with business and technology. This approach is then incorporated into the software development in a user-centric manner so that software is not only designed for the intended use, but also for the user. This approach saves time through fewer changes and reduces the development effort. However, such an understanding is often lacking and so instead of a UX designer, developers are hired who do not work in a user-centric way, but cause more change requests.

Every good UX concept starts with research in which user requirements at the touch points are queried. (Unsplash)

In your view, are there industries that are already further ahead in their UX and CX strategies?

Banks and insurance companies are among the pioneers. They are investing heavily in UX and CX, because both industries need to catch up in digitization and have recognized this. Start-ups are also at the forefront. With their lean start-up thinking, they have internalized UX and CX approaches. Corporations or companies with traditional sales models have to catch up, but there are exceptions. Here, strategic changes take longer due to the internal organization. Especially, if the existing business model has been successful for years. However, the following applies to every company: It needs at least one stakeholder who has an understanding of UX and CX and who initiates this as part of the corporate strategy. These stakeholders need the backing of the management so that they can make their experience projects a sustainable success.

"Every company needs a stakeholder who has the understanding of UX and CX to kick off the topic."

What are the main goals of your UX designs and CX concepts?

In the business environment, the main focus is on increasing efficiency. This includes easier operation of products or faster processing of services, so that customer satisfaction improves and the likelihood of a purchase enhances. Employee Experience projects have also a strong focus on efficiency: If a UX designer ensures that processes such as the handling of customer inquiries run smoother, the employees benefit. If they need less time for their tasks, that is an experience that creates satisfaction.

Another goal is to generate experiences for long-term customer retention and loyalty. Users should enjoy spending time with the company. Be it through inspiration and storytelling in the web store or valuable best practices during product research. A good example are Walt Disney's theme parks, where visitors receive so many exciting stimuli that they never want to leave the park. Transferred to CX, this means: You have to analyze which touch points you have and where it is worthwhile to build excitement that leads to greater loyalty and even to brand fans.

Design-wise, efficiency and experience are two different approaches. At an efficient touch point, we give the customer as little information as possible, because the user wants to complete his task quickly. Ideally, this touch point is automated or disappears at some point. At an experience touch point, we give him as much information as possible for keeping him with the company and for encouraging interaction. Both approaches pay off in terms of user experience, because every company is an overall system. So there are touch points that have to be trimmed for efficiency and should work smoothly for the customer. And there are experiential touch points, such as a website or a showroom, where the user should feel captured.

Experiential touch points, such as a store, are designed to engage and delight customers. (Unsplash)

Let's talk about your methods. You rely on user journey maps. What advantages does this approach offer you?

User or customer journey maps are an important building block without which neither UX nor CX can function. Journey maps help to think from the customer's point of view and to understand, visualize and communicate the individual user journey within the team. Because there is no one journey map. Every user has their own needs and interests, and so every customer journey is different and unique.

Let's take the example of buying a car: one customer prefers personal advice in a car shop, while another configures and orders his dream car on the website. Depending on age group and personality, we have a different level of digital maturity and thus a different user journey which brings us to a different target group or persona.

To increase this understanding and communicate this topic we work with a real journey and a target journey. Research and modeling of the real journeys are always data-based. This means, we don't "find" journeys, we map them. We want to find out how users really act and not how they should use a touch point from the company's point of view. To do this, we query all journey-relevant data – for example, from CRM or customer data platforms. Further insights come from in-depth interviews with target groups or, in the case of an online journey, from mouse tracking.

"We don't find journeys, we map them. We understand the company as a holistic system and therefore always visualize user journey maps for offline and online."

Since we understand the company as a holistic system, we always visualize user journey maps for offline and online. In practice, we sometimes come up against limits with this approach, depending on how rigid the company silos are. While digital teams from IT think very strongly online, employees in marketing sometimes have a stronger offline focus due to events or advertising. However, this silo thinking is not goal-oriented: after all, a user journey takes no account of individual departments because users move between off- and online touch points related to different internal silos along their journey. But in my experience, companies with a UX or CX manager think in a more cross-departmental way and consider offline and online touch points.

Why is the real customer journey so important?

I have to make a distinction beforehand: There is the customer journey, which is created on the drawing board and which represents how the user ideally moves along the journey. This is correct when it comes to the design of new products and services or a quick insight. If you want to evaluate and optimize the experience, you have to know what the user really goes through. And this can only be visualized with a real user journey based on transaction data or research results.

"Software makes our workflows more efficient. With whiteboard, Excel or PowerPoint solutions, information is quickly lost. It also helps us with stakeholder management."

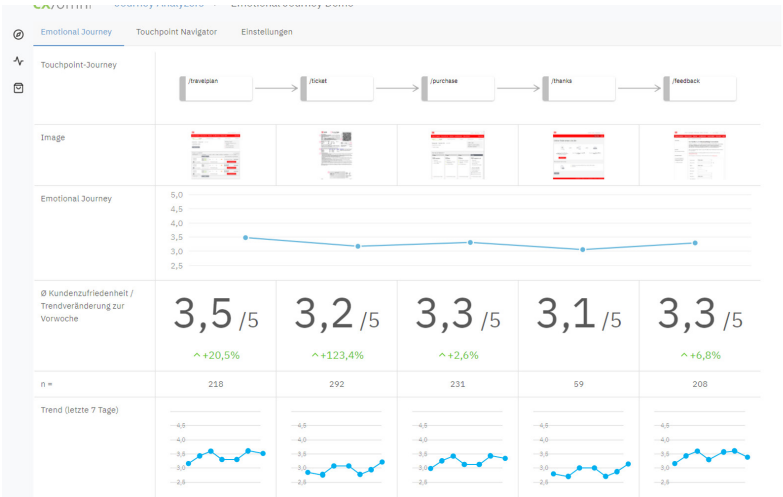
So we distinguish between the journey based on real data and the so-called proto-journey, which is conceptualized from a business perspective. This also applies to personas. There is the proto-persona, which reflects the user from the company's point of view, while the real persona relates to the actual user. Unfortunately, this differentiation is not yet applied everywhere. I would argue that 90 percent of all companies work with the proto-models when it comes to journey mapping. This is a big hurdle for sustainable UX and CX strategies: if companies discover that proto-journeys don't work because the real user acts differently, customer journey mapping is quickly off the table.

The key to success is to switch to the outside-in perspective and understand the real user. Here I see a change in recent years: companies are recognizing the problem and start thinking more from the customer's perspective. In my view, this will increase the demand for sustainable UX and CX strategies.

Why would you recommend software for journey mapping?

Software makes our workflows more efficient since the status quo of a journey workshop is available at all times and since changes can be implemented immediately and in real time. With whiteboard, Excel or PowerPoint solutions, data can quickly get lost. This is important if you work with a lot of information from in-depth interviews or customer data like we do. Additionally, we have more flexibility: since complex customer journeys are based on more data, we can manage and map this complexity without loosing track.

Software also helps us also with our stakeholder management since journeys can be visualized more easily and clearly than with sketches or sticky notes on a whiteboard. A good visualization helps internal stakeholders to see how complex journeys can be. They recognize for example that their department is also part of a customer journey and therefore understand which touch points work well or which have to be improved. Interestingly, department silos then quickly become irrelevant and stakeholders begin to consider how CX and UX can be improved holistically.

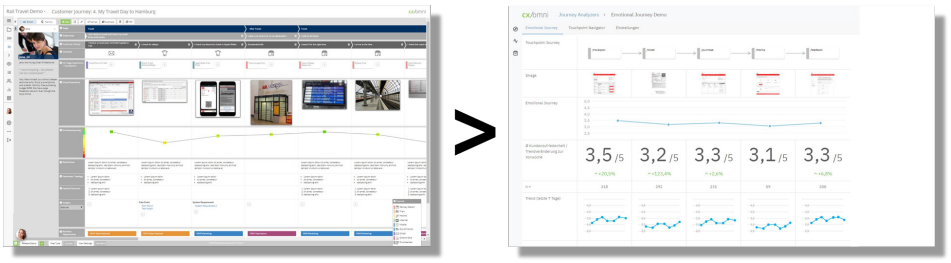


Complex customer journeys are based on a lot of data which can be better managed and visualized with software. (cxomni)

Of course, there are costs associated with buying a software. In my experience, however, this investment is worthwhile even if a company only starts with smaller experience projects. The great benefit is that in software, decision makers have immediate access to the existing customer journeys for follow-up projects what makes it easier to further adapt or develop them. CX or UX teams then don't have to always start from scratch.

What are your requirements for the right software?

It depends on the application. UX designers use customer journey mapping software on a project-by-project basis as they work on a specific touch point or design new services. They need a tool for fast, easy and flexible mapping. Settings and operation of the software are important, as sub-journeys often need to be grouped or moved. In addition, the tool should have a screen sharing feature for collaborative work, since UX design is teamwork. The integration of customer feedback is also important. However, the UX designer is only interested in user feedback for his touch point. He wants to know if the usability of his design works and how it is perceived.



Integrating customer feedback into CXM: from Journey Map to Journey Dashboard (cxomni)

CX managers on the other hand work more holistically and therefore have different requirements. As they define from the individual to the overall process where touch points are set along the journey, they need a proper visualization feature and an intelligent data integration. They work a lot with dashboards, with which they can define individual KPIs for customer satisfaction and which allow real-time tracking of customer feedback or the total number of users at a touch point. Especially customer feedback is an important insight source for CX teams to understand why there are jumps or abandonments along the customer journey. User comments in addition provide first-hand insights into what customers like and what could be improved. With this data, CX teams can sort out churn rates or drop-out rates and target improvement efforts more effectively.

Customer feedback provides important insights for touch point improvements. (Austin Distel / Unsplash)

Finally, do you have any tips when companies start with UX design or CX? What should decision-makers pay attention to?

If you are starting from scratch, I would bring an experienced UX designer on board. Otherwise, you run the risk of not tackling the topic in a sustainable way and doing patchwork with individual projects that don't help anyone. Then you should focus on one touch point with the greatest leverage effect which can then be consistently designed in a user-centric way to prove what impact UX design can have.

One example is to quickly and comprehensibly add value to a touch point by minimizing drop-out rates. Or by realizing projects that are too political or complicated, so that no one has ever approached them before. The important thing is to never forget the before and after comparison. Be it via KPIs or user feedback - the more striking, the better. Lighthouse projects help to convince internal stakeholders that UX and CX can be a real success factor for the company.

Another important thing is that projects should never start without profound research or user journey mapping. Even if management is pushing for quick results, the strategy is the be-all and end-all. A bit of design here and a bit of design there does not deliver added value. In that case, one may improve the usability of one touch point, but looses the customer at another point of the journey.

If the company already has a CX/UX department, you can combine both approaches from the beginning. In my view, both deliver the greatest business impact when combined: While the CX management manages the data and works strategically, the UX team can take care of the implementation. This is a big advantage for the internal organization: as the UX designer is in closer contact with operational stakeholders, he forms an interface between CX and business processes. This breaks down internal silos and everyone works towards a common goal: the perfect user or customer experience.

ABOUT HANNES ROBIER

Hannes Robier is the organizer of the World Usability Congress and editor of the UX Trend Report. He is also the founder of the usability and user experience consulting agency youspi. He has been working in the field of user experience, customer experience, usability and service design for more than 15 years and consults organizations of all sizes and different industries. Hannes earned the Customer Experience Management certification in the US in 2007 and was a successful participant in the BETA phase of the Certified Professional for Usability and User Experience (CPUX) - F (2013). Together with the University of Vienna, he founded the global UX Quality Certification Center and the first UX Foundation Certification of UXQCC. Last but not least, Hannes developed and leads the first Design Management course in Europe.

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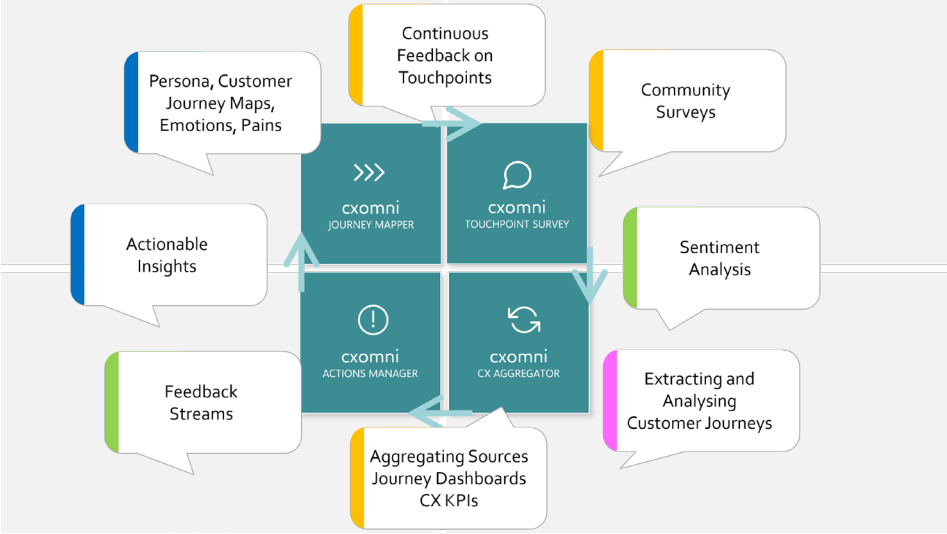
About cxomni

cxomni CXM cloud helps companies improve the customer experience at all touch points by orchestrating relevant customer feedback to the triggering processes. This enables CX teams to understand the customer's perceptions along the journey for quickly implementing optimizations or getting into dialog with the customer.



Do you have further questions about customer journey mapping and data-driven customer experience management or are you interested in a free 14-day software trial?

Feel free to contact us.

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