



Processes in Practice

Rob Davis

Rob.Davis@softwareag.com

It's the Customer Journey That Counts

*"The road of life twists and turns and no two directions are ever the same.
Yet our lessons come from the journey, not the destination" [1].*

This quote from Don Williams, Jr. (American Novelist and Poet b1968) is very relevant to process-centric thinking. Of course, in practice we are interested in the destination – the business objective that the process delivers – and part of the rationale for designing processes is to ensure, as much as is possible, the directions through the process are as consistent as possible. However, there is a danger that over concentrating on the process means we become too internally focussed on how we operate when what is really important is the customer and the journey that they go on when they interact with our processes. A few years ago if you asked most organizations what their process improvement objectives were they would typically answer: to cut costs or to boost revenue. However, increasingly many organizations are seeing customer satisfaction as a key differentiator and enabler for success. To a large part this has been driven by the success of on-line retailers such as Amazon and Dell who have been totally focussed on delivering a high quality journey resulting in an excellent customer experience. Today a good process is no longer enough; it's the customer journey that counts.

A Good Customer Experience

What is it that determines the customer's experience and leads to a good experience? We can identify some key characteristics:

1. Did they get what they wanted?
2. Was it correct (did it work?)
3. Did they get it when they wanted it?
4. Was it easy to order or request?
5. Was good help and support provided?
6. Was the price right?

All of these are important to the customer, although the comparative importance of the individual elements will vary from customer to customer, over time and for different products. What is common to them all is that they are all determined by the business processes. The "right price" may be more determined by marketing concerns than the process, but all of the others are directly determined by the effectiveness and efficiency of the processes.

There was a time when to place an order with a company we would fill in a form or write a letter. Put it in the post with a cheque and wait "28 days" for the item to arrive. In those days we didn't think much about our customer experience. However, today things are different. We expect to be able to find what we want, online, with a few clicks of a mouse key. We expect to be able to read detailed information about the product; compare different products and maybe compare prices from different suppliers. Once we have chosen the product and supplier we expect to get an instant confirmation that the item is in stock and the expected delivery date – no more "allow 28

days for delivery"! Actually I did recently try to place an online order with a company that, when I got to the final order confirmation page said "allow 28 days for delivery" – needless to say I abandoned the order and placed it with another company that offered next day delivery. Once we have placed our order we expect to be informed about its delivery status and be able to track its progress through the supply chain.

So we can see that as well as the six points listed above, a successful customer experience depends on the effectiveness of the journey that the customer travels on the way to receiving the goods and services. This journey is partly determined by levels of service we have come to expect (next day delivery, not 28 days) but also by the way we have been conditioned by the experience provided the best-in-class companies such as Amazon and Dell.

The Customer Journey

As well as worrying about how we design a good process (see my BP Trends Article, November 2009 [1]) we now also have to worry about the customer journey that we are creating for the customer. To make matters worse, the customer's perception of the journey is not just dependent on objective judgements about the effectiveness and efficiency of the process (our normal measures), but on much softer issues around what they are thinking and feeling, their perception of our brand, previous experiences (especially problems) and issues outside of our control such as the speed of their Internet connection. To a large extent their expectation of what they need to do to obtain a product or service (their mental model of the process) has been set by the best-in-class companies. If they encounter an organization that provides them with a different approach then, unless it is very clearly better than what they have encountered before, they are likely to be frustrated and as a result rate the experience as poor.

So as process designers, what do we have to do to ensure a good customer experience? Well, in addition to designing, modelling, simulating and testing the process, we now need to design, model simulate and test the associated customer journey. We can't do either of these independently, they are integrally related and the work must go hand in hand.

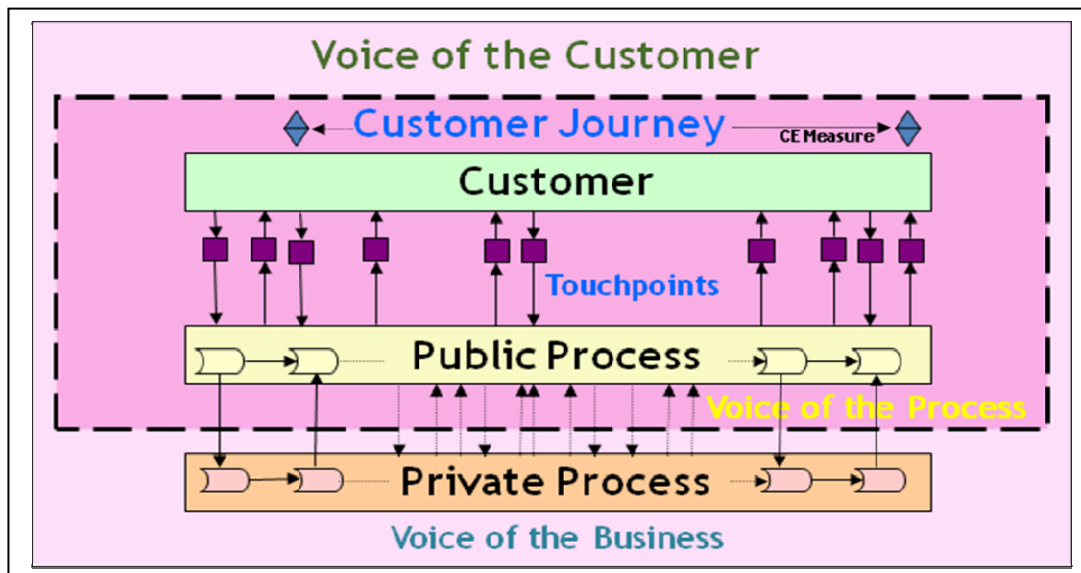


Figure 1. The Customer Journey

Understanding the Customer Journey

To understand the journey the customer will experience we need to consider the process the customer is following, the process the business is operating and how they interact. The combination of the two defines the customer journey (see Figure 1). Of course the problem is that we don't really know the exact process the customer is following. However, we can identify the key steps that they will want to follow and their interactions with our business. We can also identify the steps and interactions that, by necessity we will have to impose on them. We can also look at the best performing organizations and how they operate which will give us an insight into how people might expect the journey to progress. We don't have to slavishly follow any of these, but rather arrive at a compromise that generates the best experience in the current circumstances. We need to consider:

- The Voice of the Customer – the customer's needs and expectations
- The Voice of the Business – the business objectives and constraints
- The Voice of the Market – what the competitors are doing

What is considered the best experience will change over time as customer expectations change, technology changes and best in class standards set higher goals.

Customer Journey Modelling

The swimlane concept of BPMN modelling notation lends itself nicely to modelling customer journeys (see Figure 2). We can use Pools to represent the "private processes" of the different participants in the process – that is the customer and the business – and we can use messages to show the interactions between them. At the simplest level we can show the "abstract" or "public process" that just shows the interactions between the pools without considering the detail of the processes within the pools. Of course we increase the benefit if we model the detail of the business process, and we can sub-divide this using Lanes to represent the different departments or IT systems involved.

Many BPMN practitioners suggest that you shouldn't try to represent the customer's process and to leave the customer pool blank. However, when we are interested in understanding the customer's journey there is benefit in modelling what we expect to be the key customer activities. We can identify these customer activities by working with customers, looking at customer satisfaction survey results and by looking at the best-in-class competitors. As we develop our business processes in more detail, we will effectively impose a certain degree of process on the customer. By modelling this customer process we then can start to analyse and understand the journey that customers interacting with our business will go on.

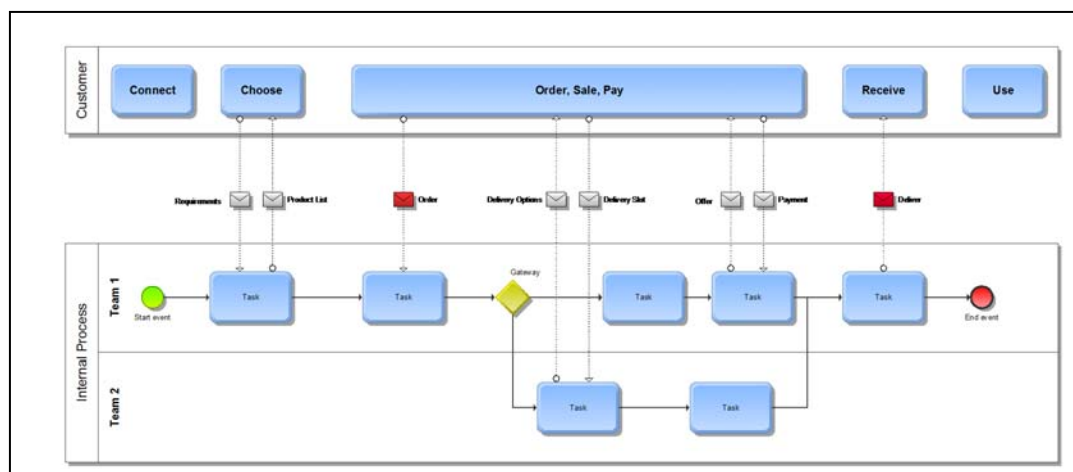


Figure 2. Customer Journey Modelling

Moments of truth

As our understanding of the customer journey becomes more detailed we will see that there are many interactions between the business and customer. However, some of the interactions are more important (to the customer and to the business) than others. For instance the point where a customer places an order is a major interaction which signifies the customer has decided they want our product or service and also represents a legal contractual agreement. This “Moment of Truth” (MofT) is recognizable by both the business and the customer.

Other Moments of Truth may not be interactions, but events that are only recognized by one of the parties. For instance the business may view the point at which a product is dispatched as an MofT, but the customer is not interested in when it was sent, only when they receive it. This highlights one limitation of a simplistic modelling of the customer in one Pool and the Business in the other. Messages between the pools, which we use to represent interactions, are assumed to occur almost instantaneously. If there are interactions that involve third parties or take significant time, then you may wish to add an additional pool to represent them.

Probably the most important MofT for the customer is when they first try to use the product and whether it works or not, but the business won't have any direct visibility of this moment. Similarly, an important MofT for the business is when it receives payment. If the customer pays by a delayed or subscription-based service, then the customer won't be aware when the business receives the payment.

Cycles of Service

Understanding the difference between the customer's MofT's and the Business's MofT's is vital to setting appropriate measures - Key Performance Indicators (KPIs) – that will be used to assess customer satisfaction and business process performance. It is very easy for a business to set KPIs that they believe are good measures of the process, but which bear no resemblance to the customer's perception. For instance the business may define the process cycle time – the length of time the process takes to run – as measured from when the customer places the order to when the products are dispatched. The customer, on the other hand, may well perceive the time taken to be from when they first went on to the website to look for a product, to the point at which the product started working. Clearly there can be a substantial difference between the two measures.

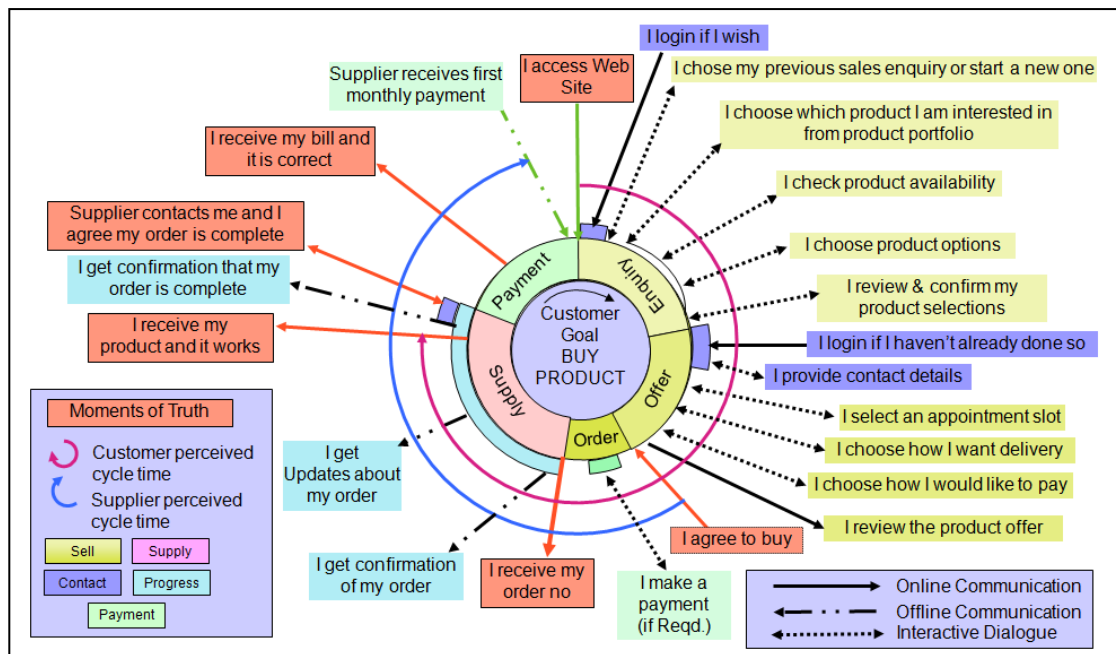


Figure 3. Cycle of Service Diagram

To highlight the difference between the customer's and the business's viewpoints we can create a Cycle of Service Diagram (see Figure 3) based on our detailed customer journey model. Here we show the key steps in the process for the business and the customer, the interaction points and Moments of Truth. We then show the time based KPIs (e.g. cycle time) from both the customer's and business perspective. We can then clearly see where they differ.

Testing the Customer Experience

Using the Customer Journey Model and the Cycle of Service Diagram we can test how our business processes perform and what the customer's experience will be. Even for many mature process organizations, testing the customer experience is an unfamiliar activity. Organizations, may well be used to evaluating processes and doing customer satisfaction surveys after a new product or process is launched. Making sure the tests or simulations are as representative as possible as the actual conditions is vital to ensure there are no disasters when the process goes live. Early failures resulting in poor experiences for the customer can have a significant and long term detrimental effect on customer perception and loyalty.

Ideally we want to ensure that our measures of process effectiveness (the Voice of the Process) are the same as the customer's measures (the Voice of the Customer), albeit the customer's measures are informal measures. Because we don't have direct insight into the customer's process we need to look for ways to get feedback from them. This might be via customer surveys or by more direct routes such as detecting when they first activate the product or when the carrier delivers the item. It is important to make the effort to obtain these customer focussed measures, because only then can you truly understand the customer journey and start to assess the customer's satisfaction.

We know that the days of "allow 28 days for delivery" have long gone, but we must also recognize that simply taking an order and shipping the goods is only part of the story that delivers excellent customer service. If you don't make sure your processes deliver the journey the customers want, you can be sure your competitors will!

References

[1] Rob Davis. "What makes a good process?" BPTrends, November 2009

Author

Rob is a Senior BPM consultant with Software AG which merged with IDS Scheer in 2011. He is an internationally recognized expert in Business Process Management (BPM) and the practical use of the ARIS Design Platform. Previously, Rob worked for British Telecom (BT) where he was responsible for selecting and implementing ARIS in a large scale implementation. Rob has built extensive experience of all aspects of BPM and specializes in providing consultancy on BPM, process modelling and design, architecture and frameworks, process governance, and integrating process and IT design. Rob has written three definitive books on the practical use of ARIS Design Platform for BPM.

For more information see <http://www.rob-davis.co.uk>.

BPTrends LinkedIn Discussion Group

We created a BPTrends Discussion Group on LinkedIn to allow our members, readers and friends to freely exchange ideas on a wide variety of BPM related topics. We encourage you to initiate a new discussion on this publication, or on other BPM related topics of interest to you, or to contribute to existing discussions. Go to LinkedIn and join the [BPTrends Discussion Group](#).