In our previous Article, we covered the relationship between process modeling and creating Customer Journey Maps. The final conclusion was that we need a comprehensive view of the customer journey and internal operations created by the many roles of working together.

Now, one could ask “why do we need it?” Why can’t we just allow CX practitioners to craft wonderful customer experiences, while operational excellence specialists do their work, IT makes sure that systems operate as they should, security guys keep hackers at bay, and compliance makes sure our board does not get fined? Life would be much easier if it worked that way. However, in reality an attempt to avoid building a shared understanding leads to a situation similar to the one described in the well-known parable of the blind men and the elephant: each of the roles sees only a small part of a bigger picture, while not accepting the fact that their vision is not complete. So they build a solution based on their own limited observation and understanding.

Many organizations try to work like this, allowing different units to work on unaligned activities in the hope that somehow all this work performed in silos will create a perfect result (this recalls of the ATAMO effect mentioned by Sharp & McDermott). And this is a significant problem from a management perspective, as well as the customer experience and the operational excellence perspectives.

Various management methods call for a broad perspective with a lens used for analyzing the organization and environment. The most obvious example can be the Balanced Scorecard by Kaplan and Norton where, by default, analysis applies four perspectives: learning and growth, processes, customer, and finance.

Also, recent examples like the Business Model Canvas by Osterwalder and Pigneur also show clearly that analysis of business models requires analyzing various aspects, including Key Activities, Value Propositions, and Customer Relationships and others (which cover both value and efficiency. The same approach is seen in frameworks for analyzing disruption potential by David Rogers where he looks at both the Value Proposition (customer view) and Value Network (business view).

This approach allows us to avoid the dangerous trap – of having applying a narrow vision because of limitations we impose on ourselves. If we think we need to focus only on an internally defined process, we will ignore all aspects that do not fit our definition - as if we were wearing blinders. Also, in a similar way if we think only about the customer experience we may fail to notice additional possibilities of using capabilities already present in the organization. For those interested in using various models for the purpose of strategic Business Process Management, there’s a webinar on this topic available.
The approach focusing on value and balancing the internal and external view can also be applied on a more operational level. This is not something unique (Michael Hammer’s voice of the customer & voice of the business, Six Sigma's VOC and Steve Towers’ Successful Customer Outcomes come to mind when it comes to combining perspectives), so there’s no reason to reject this approach as untested. It works fine both for improving existing processes as well as designing new ones (e.g. as a part of Digital Transformation initiatives).

Let’s explore two examples. The first one is based on a story of GE Aircraft Engines I learned from the Polish Six Sigma Academy training. GEAE was struggling with a process of fixing engines delivered to their company. They were focusing on classic operational excellence methods to make the process faster and better, but the results were not pleasing the customers. However, the introduction of wing-to-wing perspective changed everything. Taking a customer perspective demonstrated that they did not care how long it took GEAE to fix the engine. Instead, they were more interested in the amount of time that the plane could not fly because of the engine malfunctioning. This new perspective caused changes such as moving closer to customers (to reduce transport time) and finally, the idea of being paid on the number of hours when engine is working.

The second example is a story I heard recently from my student about a failed approach to make a process digital in a logistics company. Instead of focusing on the logic of a process and its value to both the company and customer, they got sidetracked by "new toys" and decided to implement voice recognition in their call centers.

On the surface it made sense: customers could call and say the number of the parcel to receive status information. This method should shorten the process and lead to more satisfied customers - right? However, in reality, it could look like this: the customer receives an SMS with the parcel number while driving and decides to call the company. The IVR asks the customer to provide the number, which he can’t do because she is driving. A customer could hope that after a failed attempt she will be redirected to a live agent, but the IVR is programmed to force the loop 3 times before rerouting is allowed. Result? Investment in new software destroys customer value instead of adding it and makes the whole process longer and more expensive.

All those problems could easily be avoided if the final solution was created by a team of people from different areas using a shared repository to understand implications of changes.

Apart from the importance of combining outside and inside perspective inviting many roles to collaboration brings additional benefits - it provides different ways of thinking and different tools, which is invaluable because often problems that seem difficult to solve for one role can be easily fixed by tools and skills possessed by other roles. It applies both to software tools (e.g. software for managing funnels online as described by Ryan Levesque in "Ask" allow an unprecedented level of personalization at scale, RPA tools allow us to free employees to focus on activities providing value for the customers and so on) and organizational tools used in problem solving etc.

Recent research by Digital Clarity Group stresses the importance of using skills originating from both the customer experience and BPM teams for the purpose of
digital transformation. In early 2017, we declared that operational excellence (BPM) practitioners and customer experience (CX) experts would join forces to transform the business, starting from initial customer interactions and going all the way through to back office operations that support those customer interactions. It was a powerful statement, especially since the project teams working on different aspects of end-to-end processes are often oceans apart—unaware of each other and their respective projects. Is it any wonder why they are blissfully unaware of each other's efforts? After all, operational excellence practitioners working in process improvement teams typically report to the COO or another line of business executive, while most customer experience practitioners report into marketing or a customer experience executive.

Most firms start their “outside-in” approach by looking at interactions from the customer's point of view. They map the customer’s digital and physical experiences across devices, channels, brands, business units, etc. so that ultimately the business will deliver fulfilling experiences to customers at all times, under all circumstances, via all channels. This is a long reach for organizations and will take a long time to realize that vision. In the meantime, “Inside-out” practitioners look at internal business processes. Most inside-out efforts tend to focus on efficiency, lowering defects, and improving quality, and are less customer-centric than outside-in.

Now, in a few visionary organizations, outside-in and inside-out teams are beginning to realize they are reverse mirrors working on different aspects of the same processes and are beginning to join forces. This does not happen if marketing is driving the digital transformation process, but does have a chance of success if digital transformation is driven by the C-suite, a chief customer or digital officer or the CIO. This trend will move slowly that won’t occur overnight. That’s because putting the two world views together requires senior leadership, significant effort and skills, and a substantial organizational change management effort.

Most customer experience and operational excellence teams don’t work together. In part, it’s because the customer experience and operational excellence practitioners are different from one another—starting with different ways of thinking, different training and expertise, and different tools for solving business process problems. Yet, despite their differences, business transformation projects require the participation of practitioners from both disciplines. Here are some thoughts about how the different disciplines can work together:

**Operational Excellence**

- Practitioners need a shared business model strategy (which includes both customer experience and operational excellence) developed at the executive level
- Operational excellence practitioners must learn about, understand, and use voice of the customer techniques and customer journey mapping approaches
- Operational experience practitioners should learn from customer experience practitioners through cross-functional teams and secondly to customer focused teams
- Change management practitioners must also be embedded in operational excellence projects for long term impact
**Customer Experience**

- Customer experience practitioners need a shared business model strategy with operational excellence practitioner driven by the executive level
- Customer experience experts need a working knowledge of Lean, Six Sigma, and value streams
- Customer experience teams must learn/understand business process modeling
- Change management practitioners must also be embedded in customer experience projects

<table>
<thead>
<tr>
<th>Comparative Factors</th>
<th>Customer Experience Excellence</th>
<th>Operational Excellence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Understand and delight the customer, look at the business from the outside-in</td>
<td>Operate the business cheaper, better, faster while delivering value to shareholders and stakeholders</td>
</tr>
<tr>
<td>Measurement</td>
<td>Net promoter, CLV (customer lifetime value), click through rates, Voice of the customer (VOC)</td>
<td>Lower defects, risk management, quality metrics, safety metrics</td>
</tr>
<tr>
<td>Tools</td>
<td>Customer journey mapping, personas</td>
<td>Lean, Six Sigma, Kaizen, Value Streams, Agile</td>
</tr>
<tr>
<td>Orientation of project team members</td>
<td>Right brain</td>
<td>Left brain</td>
</tr>
<tr>
<td>Focus</td>
<td>Experience design, design thinking</td>
<td>Continuous improvement, process transformation</td>
</tr>
<tr>
<td>Maturity of the discipline</td>
<td>Immature, emergent</td>
<td>Mature, established</td>
</tr>
<tr>
<td>Typical sponsor</td>
<td>Marketing exec, CX exec, customer service exec, CxO</td>
<td>COO, CIO, CEO, CxO</td>
</tr>
<tr>
<td>Typical technology</td>
<td>Omnichannel, CRM, ecommerce, content management, customer analytics, content analytics, mobile</td>
<td>BPM software, process modeling, business rules, robotic process automation, enterprise apps (ERP, SCM, PLM)</td>
</tr>
<tr>
<td>Process orientation</td>
<td>Immature, not typically focused on end-to-end processes</td>
<td>Mature, focus on end-to-end processes</td>
</tr>
</tbody>
</table>

While on the surface they are contradictory (soft and “fluffy” CX versus data based BPM, right brain thinking by CX vs left brain thinking by BPM) they, in fact, complement one another like the concept of yin and yang from Chinese philosophy.

Only when we use the total of skill set of all our employees are we really capable of creating coherent solutions that both please our customers and are feasible from a business point of view - not by sacrificing any of those dimensions, but by leveraging both.
So, whenever you start a project that involves processes make sure to involve everyone from various departments with different skill sets to get feedback and ideas coming from both the inside-out and outside-in view.

If you start from a process perspective, make sure to check whether the planned change creates value for the customer (and what could be done to create even more value) as well as how you can use the skills and resources inside the organization to make it work better (e.g. using new methods for process automation).

If you start from a customer perspective, remember to validate with your colleagues that the change can be supported by a coherent set of business processes and integrated applications and if perhaps those resources allow you to serve different customers as well.

This can be nicely summed up by a song from a Disney movie Mulan 2 called "Lesson number one":
"One alone is not enough
You need both together
Winter, summer
Moon and sun
Lesson number one"

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