

CX-PRO

BEYOND THE BASICS

Advanced Insights for
Customer Experience
Professionals



Edited by Karl Sharicz

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Chapter 12—Customer Progress Design (jobs-to-be-done)

Eckhart Boehme

“When we buy a product, we essentially ‘hire’ something to get a job done. If it does the job well, when we are confronted with the same job, we hire that same product again.”

Clayton Christensen

Your Mission: Helping Customers Make Progress

Helping customers improve their lives is one of the greatest services organizations can provide. Hence, focusing on improving the status quo, meaning refining, or fixing existing products or services, is not enough to unlock the full potential of value creation. Helping people to improve their lives or businesses also offers great growth opportunities for your company. This is reason enough to look at how contributing to progress can be done most effectively.

If we want to delight customers beyond the products and services they already use, we need to help them change and adopt new ones that meet their needs better than before. To do this, we...

- must understand what unmet needs exist,
- get a sense of which need fulfillment will make a positive contribution to our business,
- understand how we could help customers most effectively acquire new products or services,
- and finally help customers realize the promised benefits.

In short, we need to help customers master their “journey to improvement” so that it makes a difference in their lives and at the same time helps our company grow profitably. This undertaking can be divided into two parts (1) doing the right things for the customer and the organization and (2) doing things the right way by creating the right value propositions and experiences.

In recent years, the so-called Job to Be Done (JTBD) theory, popularized by Harvard Business School Professor Clayton Christensen, emerged as an effective tool to guide us in “doing the right things.” This theory argues that customers “hire” your product or service to get a job done. They try to achieve a specific outcome in a certain circumstance.

What we subsequently try to understand are...

- the specific jobs that customers are trying to get done,
- the significance of these jobs,
- the potential to relieve their pains and to improve the results related to these jobs.

These factors help us decide what value-add we could create for customers. In addition, assessing the business potential for each “customer job,” will help us not only to do the right things but decide what customer “job” will provide the greatest business potential. While it is crucial to understand how customers want to improve their lives or businesses, the breakthroughs to innovative customer experiences are often—unarticulated—insights into what desired outcome they are looking for.

A Holistic View of the Customer

Organizations most effectively align with customers when all customer-facing activities are centered around the same customer job and are targeted at helping customers move with ease through their customer journey. To get clarity on what product, marketing, and sales strategies are most useful, we developed several mental models that help understand what triggers customers to move to the next phase and what support customers need in each phase of the customer journey to complete it successfully.

Introducing Customer Progress Design

Customer Progress Design® (CPD) is a method for developing a customer-centric strategy. CPD is based on the principles of the Jobs to Be Done (JTBD) theory that aims at understanding why customers pull new products into their lives.

CPD helps to develop an overall strategy that supports human beings in making progress in their personal life or in a business context. This strategy consists of solutions (products, services, brands, etc.) as well as marketing, communication, and buying aids that help them to satisfy their desire for progression. With the help of this integrated approach, deep, targeted, and relevant insights are achieved. They can be ultimately translated into strategies for serving existing and new markets, meaning clusters of “customer jobs.” In doing so, CPD helps organizations stay relevant to existing customers and facilitates bringing in new ones.

These benefits are made possible by using the desired improvements in life or in business as a starting point for ideas, for innovations, and as a basis for marketing campaigns. Furthermore, this integrated approach promotes collaboration between the different functions within the company. A universal picture of the need for progress is always at the center of the analysis.

The following insight serves as the basis of our method: people set out on a journey to seek progress when they need improvement. Contrary to what most organizations believe, customers aren’t looking to buy their product... they are looking to “hire” a solution to get a job better done.⁶ Since in most cases people need external help to do this, insights into the need for progress are of utmost importance.

If a company’s development and marketing activities are oriented toward enabling people to progress in life, then they have a clear organizational purpose. This purpose benefits customers as well as suppliers. The fundamental motive of CPD is to enable people to progress, not to manipulate their behavior. This is expressed by the CPD’s principle that customers should always be able to act in a self-determined and conscious way.

The Four Phases of Customer Progress Design

In the Customer Progress Design⁷ model, human beings make progress in cycles. Once they notice that they need improvement they enter a phase of “passive search” where they become aware of the need to act. In the second phase, they actively search for a new solution. Often, this phase is exploratory because customers at the beginning of their journey are not familiar with the solution space. Sometimes they even have the challenge to articulate what they are looking for and or don’t know the exact terms of the solution(s) they have in mind.

⁶ Clayton Christensen et. al., *Competing Against Luck* by Harper Collins, 2016

⁷ For details see unipro-solutions.com

In the third phase, when they find a set of appropriate products or services, they need to compare them and decide which one is most appropriate and provides the best value for the money. In the fourth phase, after they have acquired the “new way of doing it,” they experience the new solution and assess their success. If the acquisition were successful, they would keep it and build a new habit. If not, they may return it, acquire something new, or go back to their old behavior.

These phases are triggered by events. Something happens in the life of an individual that causes him or her to move to the next phase of the cycle: a first thought makes them feel a deficit, so they look passively for a new solution. Perhaps they procrastinate. A trigger event makes them then enter an “active search.” Maybe he or she got inspired by a new product, or something happened that increased their “pain.” In this phase, they also may make up their mind about what they want to achieve in a new situation and what to avoid. Yet another trigger event may cause them to consider specific products or services. This trigger could be a “road-block” that disappeared or one that increased their pain. Sometimes there are even trigger events for buying a product at a certain time.



Figure 1: Customer Progress Design flywheel.

As providers, we can help customers make progress by providing help in each of the four phases.

True customer-centricity starts with caring about them even before they become customers. Our service as a provider could be helping people end their procrastination. Procrastination has the potential to be harmful or at least create regret about their late start to tackle the issue at hand.

Like the “Just do it”⁸ campaign by Nike, one of the most successful advertising campaigns in history. The campaign aimed to address the rising problem of obesity and encouraged the public to get physically active. This is when we as providers can encourage customers to enter their customer journey and stop postponing.

⁸ <https://medium.com/@dimitrios.kales/just-do-it-the-secret-story-behind-the-worlds-most-recognisable-slogan-7736d901d8ef>

In the active search phase, we can help customers to explore the solution space. Our job is to inspire them and consider the “new.” There could be vastly different solution categories that fulfill that need. We can help customers form their opinion by providing orientation as to what the solution space could look like. Examples of services are self-assessments, questionnaires, checklists, consulting services, or any kind of orientation. We can also ensure that our solution is found and considered.

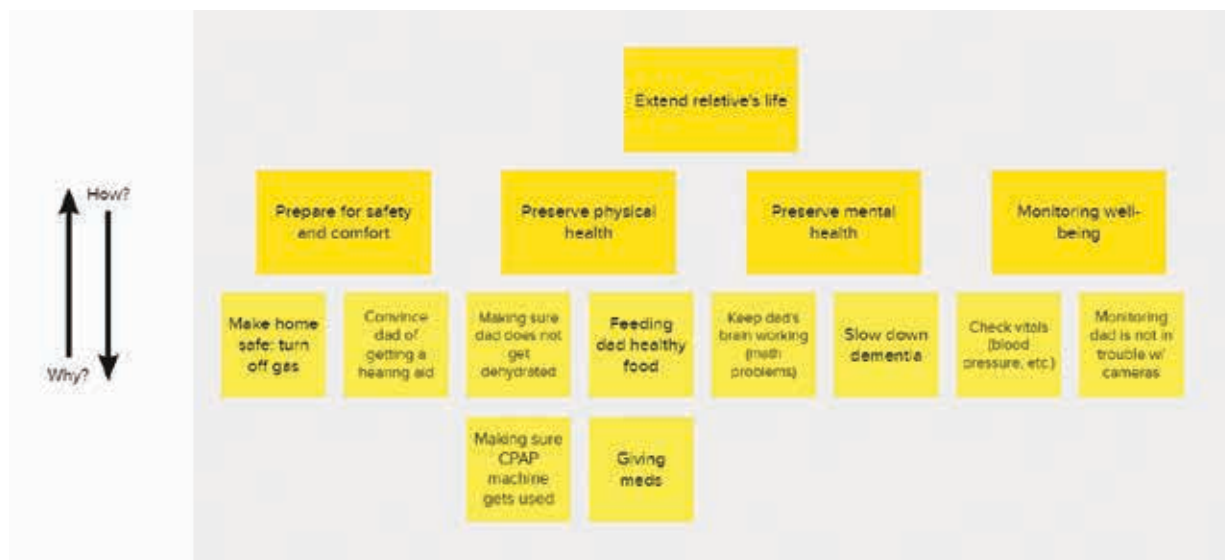
In the trade-off phase, customers look for clarity as to what alternative is the one that best meets the objectives. Customers often like to test-drive offerings to experience first-hand if the solution is a good fit. They also like to buy products or services with the “best value.” In this phase, we can also manage objections proactively that the customer may have.

In the fourth phase, customers are looking for a successful execution of their jobs-to-be-done. In this phase, providers need to offer an alternative that is better than the “old way.” The sum of the benefits must be greater than the total cost of acquisition and adoption. The experience should be surprisingly good and reinsure them in their purchase.

As providers, we don’t need to perform all these services. We have the option to collaborate with other providers in the eco-system that specialize in certain products, services, marketing, or sales disciplines to augment our performances.

Jobs to Be Done for Clarifying Customer Needs

A customer job is the progress that a person wants to make in each circumstance.⁹ This presents itself as *a job to be done*. Customer jobs exist at different hierarchical levels: Jobs at a high level describe the progress in life they are seeking. These usually represent an unspoken or subconsciously pursued purpose. Jobs on a low “altitude” consist of specific task and lead into the “jobs” above.¹⁰



Customer Job Map

⁹ Clayton Christensen et. al., *Competing Against Luck* by Harper Collins, 2016

¹⁰ Jim Kalbach, *The Jobs to be done Playbook* by Two Waves Books, 2020

Realizing the customer’s job at the highest level is important to keep an eye on the intended progress and not get lost in the details of a task. The objective is to find out what purpose a customer wants to pursue but may not be able to articulate. Knowing customer jobs at a low level enables us to realize them technically.

A customer job can have one of the following *dimensions* or a combination of them:¹¹

Functional

A functional job relates to the factual performance of a functional task or factual solution of a problem.

- E. g. getting from A to B, calculating a value, or getting registered for an event.

Emotional

An emotional customer job refers to a person seeking emotional satisfaction or fulfillment.

- E. g. enjoying oneself or obtaining peace of mind.

Social

A social customer job refers to the tasks or goals related to social interactions, connections, and relationships.

- E. g. Getting recognition or feeling well by helping others.

Consumers and business customers usually try to pursue combinations of these jobs, such as transporting a delicate good from one place to another and having the peace of mind that it arrives at its destination on time and intact. It is crucial to understand which jobs or job combinations customers try to get done.

The 12 Elements of Customer Progress Design

To make better business decisions, we will need data from customers about their “journey to progress;” customers who acquired a new product or service, tried a workaround, or compensated for a deficiency. Asking hypothetical questions like future actions or intentions is of little value and can even be misleading. This data is usually not available in databases or on the internet. We can gather it by doing thoughtful customer interviews. We can investigate the buying journey of consumers or business buyers. We can find out about their experience with a product or in a job role. There are many topics that we should investigate to understand customers holistically.

In our model, we look for specific factors and we call them “The 12 Elements of Customer Progress Design” to understand customer progress.

¹¹ <https://hbr.org/2016/09/know-your-customers-jobs-to-be-done>

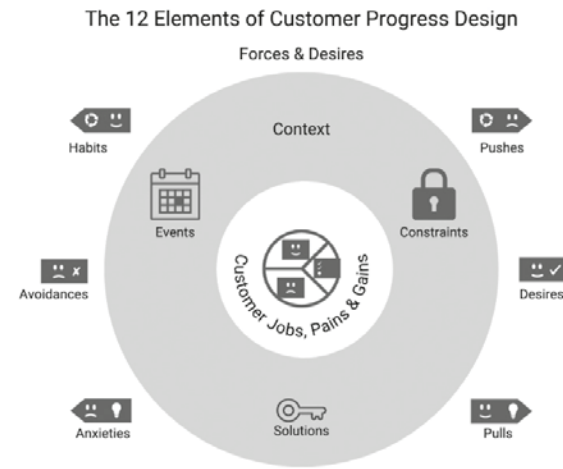


Figure 3: Customer Progress Design Mental and Data Model

Practical Tools and Process

To facilitate customer-centric strategy development and the gathering of data about “customer progress” we developed tools and a process called Customer Progress Design. One of our tools, The Wheel of Progress® helps collect data about customer journeys from customer interviews. It is a visual help that allows customer researchers to capture and structure the responses from the interviewee.

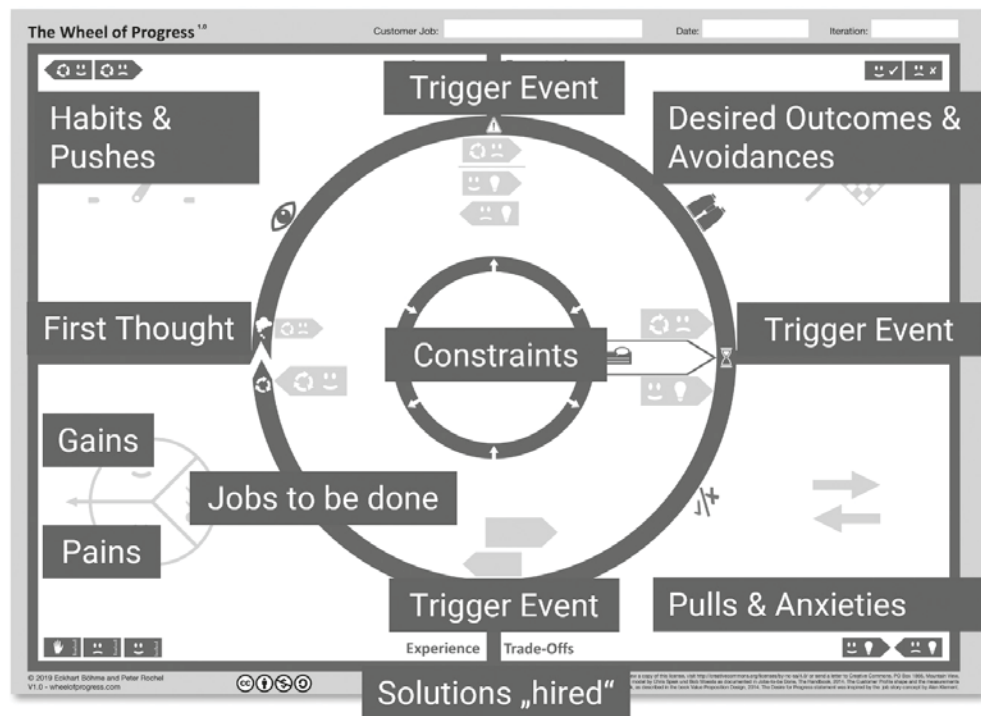


Figure 4: The Wheel of Progress

To find out what the “journey to progress” for a customer looked like, we examined certain characteristics (elements) of progress-making within the cycle. This data helps us to learn about the nature of customer jobs,

the context in which customers strived for progress, and psychological forces. The sum of all variables characterizes the sometimes-rocky road to improvement.

In our process, the data from several customer interviews will be evaluated, clustered, and generalized. To help focus on underserved customer jobs, jobs will be prioritized using rational criteria. Prioritized customer jobs and select aggregate data will be used to feed a strategy canvas that helps to ideate strategies for the four phases of customer progress. In this chapter, we can only cover the method at a high level.



Figure 5: The Customer Progress Design Process

Conclusion

To provide a great customer experience, it is important to be empathetic and optimize existing products and practices. However, making the biggest impact on customers’ lives takes place when we help them to change and make progress with new solutions. The unprecedented clarity of understanding customer needs that the Jobs to Be Done theory provides, is an enabler for developing products, services, marketing messages, and buying aids, that truly make a difference in people’s lives by helping them to move to a better place easier. Focusing on jobs-to-be-done shifts the focus from an offerings-based perspective to a true customer-centric perspective. Making customer progress the mission, provides a powerful purpose and alignment tool that can serve as a north star for the entire organization.

IN THIS SECOND CX-PRO BOOK SERIES, following the acclaimed “CX-PRO: A Practical Guide for the New Customer Experience Manager,” the selected authors delve deeper into the intricate realm of Customer Experience Management (CXM). In this volume, a group of sixteen diverse voices, each a luminary, unveils a rich tapestry of insights and practices, guiding readers beyond the fundamentals and into the realms of mastery within the CX discipline.

Against the backdrop of a rapidly evolving business landscape characterized by globalization, technological advancements, market diversity, consumer empowerment, regulatory complexities, and economic interdependence, the importance of Customer Experience as a business strategy emerges. It becomes evident that CX is not merely a component of business strategy but the very heartbeat of successful enterprises, guiding decisions and fostering sustainable growth.

The journey through this book begins at the strategic helm, where the imperative of aligning CX with executive leadership is explored, emphasizing the pivotal role of organizational alignment in fostering customer-centricity. From the boardroom to the frontlines, the narrative traverses, illuminating the vital perspectives of frontline staff and the methodologies for nurturing proficient CX professionals.

Chapters unfold, elucidating the intricacies of delivering exceptional customer service, harnessing the Net Promoter System effectively, utilizing data-driven insights, storytelling as a compelling narrative in CX, leveraging emerging technologies like AI, and embodying authenticity and integrity in CX interactions.

The book underscores the collaborative nature of professional growth within vibrant communities of CX practitioners, consultants, and educators, advocating for human-centered design principles, a quality-centric approach, and the recognition of the enduring power of the human connection in CX. Insights from employees are celebrated as transformative catalysts for innovation, and diverse career paths within the CX ecosystem are explored.

Collectively, these chapters form a comprehensive guide for aspiring CX professionals, offering profound insights, practical strategies, and inspiring narratives to navigate the complexities of modern business and excel in the dynamic discipline of Customer Experience Management. As readers embark on this journey, they are empowered to chart their course towards excellence, guided by the wisdom of seasoned practitioners and educators, towards the mastery of CX as both art and science.

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