

How to Use Process Management to Improve Customer Experience

by Andrew Spanyi

Customer experience is the new battleground. This is evidenced by [Gartner's report that over 80% of marketing leaders](#) expect to compete mainly based on customer experience (CX). Yet, the current reality is that many efforts to improve CX are mired in [isolated, bottom-up initiatives](#). Even when the CX agenda is top down driven, more often than not, a departmental mental model dominates. Do you also wonder why there's so much lip service devoted to "collaboration" – but so little clarity on precisely who needs to collaborate and how?

Viewing the business from the outside-in **and** in a business process context is crucial to success in improving customer experience. It is a big part of shifting management attention from what individual departments do - to how departments collaborate to create value for customers. This perspective clarifies who needs to collaborate and in what way to create value. But it's easier said than done, in part because it requires close cooperation between process management and customer experience professionals.

A well planned effort begins with a concise, one page customer journey map that documents, at a high level, the entire customer journey. Many companies already emphasize key touchpoints, but the more important area of focus to drive action is the [customer's end-to-end journey](#). Such a customer journey map (CJM) begins to become effective when it is discussed by the senior leadership team and is transparent throughout the organization.

A good customer journey map will not only identify the critical touchpoints or "moments of truth", but it will also lay the groundwork for linking the key end-to-end business processes that create value for customers. The best way to define the relevant processes is to use the "from-to" nomenclature that is frequently associated with value streams. Using definitions such as "inquiry to quote," "quote to order," "order to delivery," and "request to resolution" can better clarify the boundaries of the process, the desired customer outcome(s), the most customer centered performance metrics and the departments that need to collaborate for value creation. That is why this nomenclature is far superior to using phrases or one word definitions of the business process as the naming convention. Consider the following few examples of this nomenclature:

- Promote to quote
- Order to delivery
- Requisition to receipt
- Schedule to produce
- Idea to commercialization
- Requisition to On-board
- Requirements to Maintenance

Just imagine how the dialogue around the connection of customer needs to the “inquiry to quote” process can create thought provoking insights. Similarly, imagine how the dialogue around the connection of customer expectations for timely complete order delivery need to the “order to delivery” process can create valuable insights.

Connecting the key insights on how cross functional processes work to customer needs is one key component in shifting management attention from a departmental view to a customer focused, value chain view. It is also an effective means of embedding customer focus into the companies operating model.

Furthermore, it can help drive success with digital transformation – where [many firms are failing](#). Another major benefit of linking how enterprise level business processes create value for customers is the clarity it can create in dealing with data silos. Many organizations struggle with their automation efforts due to the data silos that have been created over decades by legacy systems.

Interested? In that case, consider the following success factors in using Process Management to improve Customer Experience.

1. The organization has developed a high level CJM.
2. The leadership team has passion in discussing key touchpoints in the CJM.
3. The organization has developed a list of enterprise level processes using a “from-to” nomenclature and connected process performance to customer needs.
4. Process improvement projects are launched to improve performance at key touchpoints.
5. Project prioritization is driven primarily by customer value creation.
6. Each improvement project is staffed with cross functional teams.
7. Project success is measured based on the degree of improvement in the quality and timeliness of service to customers.

There are many pitfalls to avoid along the way. One of the more common pitfalls is diving into too much detail too soon. Another is defining processes at a too low, granular level. High level schematics are needed for dialogue and action planning. Most organizations find that there are no more than 8 to 14 enterprise level processes. The more detailed schematics can come later. It’s the dialogue around how enterprise level business processes create value for customers that [drives needed collaboration and action](#).

Viewing performance in a customer centered, business process context is far superior to seeing it according to what individual departments do. In the future, as Marc Benioff tweeted, there’s a good chance that [“every digital transformation is going to begin and end with the customer...”](#)

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