UPGRADE YOUR MANDATE

evolving from user experience to customer experience

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We were here

Actual organizational chart we were given

We were here
To truly serve our audience, we need to overcome our legacies and engage them in new ways
4

old ways of thinking
At worst:

“a gullet whose only purpose in life is to gulp products and crap cash.”

Ruthlessly stolen from *The Cluetrain Manifesto*
#2

Sheep

Docile and gullible
Stories and messaging
Preferences!
Homo Economicus

Highly rational
Maximizes utility
Quantity!
#4

Robot
Task oriented
Goal driven
Efficiency!
Emotional + Intellectual + Functional
1: convenience

bank convenience
consolidation

site experience indicates ease of working with bank

2: online

online convenience
multi-session research
research online first
go online first to conveniently get knowledge

3: knowledge

knowledge is power
need to be a responsible consumer
no clear end state
going through the motions
compelled to seek bargains
get knowledge before talking to a person

4: emotion

emotional requirements
sensitivity to cost
identification with personas
privacy and security
serious transactions not online
multi-channel process
3: knowledge

- need to be a responsible consumer
- fear of being manipulated
- no clear end state
- going through the motions

knowledge is power

- compelled to seek bargains
- get knowledge before talking to a person
- go online first to conveniently get knowledge

emotional requirements

- sensitivity to cost
- identification with personas

multi-channel process

- privacy and security
- serious transactions

get knowledge before talking to a person

planning requirements

- financial planning
- financial planning resources
- calculator

Define Personal Needs

- lead the buying process
- create mental list of needs
Emotional + Intellectual + Functional

Empathy
MEET RUSSELL

Russell is a 38-year-old Controller at Optiview. He's worked at PWC (though not with Lawrence). He came to Optiview less than two years ago to help Lawrence manage the details of taking the company public.

Since then, he's spent a lot of time building a top-notch accounting team.

His job duties include: Writing policies and procedures; managing SOX compliance; managing covenants; structuring operations; responding to board questions; responding to auditors' questions; writing communications; preparing reports for board and investors.

“You see those two thick binders? That’s the paperwork for our IPO.”
CHARACTERISTICS

Operational Mindset: I set the agenda for the organization, facilitate delivery of items on that agenda and set up my team for success.

Managing people: I spend 3-5 hours each day reviewing the work of my direct staff and making sure things are done right.

Established streamlined processes: All of the processes for dealing with SOX and SEC issues, I built from the ground up.

Past-focused: Accountants tend to be backward-looking, focusing on historical data. The Director of Planning and Analysis is future looking, and I work very closely with her.

ESTJ (The Fieldmarshal): ESTJs enjoy creating order and structure, are very thorough, follow projects through to completion, prefer tried and true ways of doing things and put a tremendous amount of effort into doing things the right way, ensuring everyone complies with and respects schedules and procedures.

“I know everything there is to know about accounting.”
RUSSELL

MOTIVATIONS

Defines success as avoiding crises: Public companies are all about staying within the lines, which are painted pretty closely together. I measure our success by our ability to produce quality financial statements that pass third party review.

Takes pride in knowledge: I know accounting inside and out. I am on top of Federal rules and regulations. When I can win arguments with auditors, it's a rewarding feeling.

Thrives in complexity: I have to stay on top of things. To do so, I am always optimizing, trying to find ways to get things done better, faster and with less people.

Aspires to grow with the company: As the company grows, my responsibility becomes greater and the level of impact I can have gets bigger.
RUSSELL

UP AT NIGHT

Making judgment calls keeps me up at night: Even if I am on top of the 25,000 pages of revenue recognition rules, there will always be grey areas. Sometimes accounting requires judgment, and I have to be prepared to defend my decisions to the end.

Make mistakes, lose job: If we have a re-statement in this environment, we all lose our jobs. Controllers walk a tightrope without a safety net -- that's the nature of our job.
RUSSELL

BEHAVIORS

Maintains an organized weekly schedule: Things intensify around the quarterly and year-end close, when auditors are reviewing our financial statements. The rest of the year, I have more control over my time.

Wants to stay on top of rules and regulations: Since Enron, controllers have had to reengineer their work to keep up with this compliance environment. Although Federal rules don’t change from industry to industry, I have to stay on top of changes and pronouncements.

Maintains a consistent daily schedule: I take care of urgent tasks, I meet with my team members, then I work on longer projects. I generally block out my time 2-3 days in advance.

Travels occasionally: I travel to oversee international operations. International offices have their own finance teams, but they are small and need oversight.

Tries to maintain work/life balance: I often have to work long days, but I actively seek ways to recharge.

Primarily uses Microsoft Word: I write a lot—position papers, responses to comment letters and other communications. I rarely get hands on with accounting tools; I rely on my team to provide the inputs that I need.
Client Focus: Corporate Tech.

What motivates you?

SVB Financial Group
United Breaks Guitars

www.davecarrollmusic.com
22. Southwest Airlines

72. Continental Airlines
90. American Airlines
91. Delta Airlines
93. United Airlines
96. Northwest Airlines
103. US Airways/America West

Forrester’s 2008 Customer Experience Rankings of 114 American Companies
22. Southwest Airlines

72. Continental Airlines
90. American Airlines
91. Delta Airlines
93. United Airlines
96. Northwest Airlines
103. US Airways/America West

Forrester’s 2008 Customer Experience Rankings of 114 American Companies
22. Southwest Airlines

“Colleen is primarily responsible for the humanistic culture that we have at Southwest today...One of the really significant things she did was give our people on the front line a lot of flexibility. Basically, she ascertained that we could not anticipate every situation that would evolve in a given station at a passenger terminal. Therefore, she told our employees--and meant it--that as long as you are leaning toward the customer, you are OK...They did not need to ask permission from anybody to do so.”

Herb Kelleher, founder of Southwest Airlines
Customer experience is not something an organization buys, it’s a mindset it adopts.
experiences

interactions

touchpoints

procedures

systems
----- SET UP VCR ----- 

REPEAT PLAY : OFF
BEEPER : ON
INPUT SELECT : TUNER
SET AUDIO MODE

SELECT : PUSH SELECT ↑/↓
SET : PUSH SET KEY
END : PUSH MENU KEY
Tivo’s Original Mantras

It's entertainment, stupid.
It's TV, stupid.
It's video, damnit.
Everything is smooth and gentle.
No modality or deep hierarchy.
Respect the viewer's privacy.
It's a robust appliance, like a TV.
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New Mantras

The TiVo box makes TV better...

• It is reliable.
• It puts me in control.
• It's easy to use.
• It's smart and helpful.
• It's responsive.
• It's all about entertainment.

I can't imagine life without it.
Brand Attributes

Voice

Experience Principles

How we write and talk

How we interact
Contents

Introduction 1  How To Create a Document 4

CHAPTER 1
How To Customize This Manual 1  About the “Picture” Icons 1
About the “Picture” Icons 1  How To Customize This Manual 1
Section Breaks are Key 2  About the “Picture” Icons 1
About Pictures and Captions 2  Section Breaks are Key 2
How To Generate a Table of Contents 3  About Pictures and Captions 2
How To Create an Index 3  How To Generate a Table of Contents 3
How To Change Headers and Footers 3  How To Create an Index 3
How To Save Time in the Future 4  How To Create a Document 4
How To Create a Document 4
Microsoft Word 2002 (2001)
Common screen resolution: 1024x768
Number of toolbars: 30

User Interface Additions:
Task Panes (5)
On-Object UI: Paste Options
On-Object UI: Undo unwanted "Auto" actions
Smart Tags: Pink-squiggle recognized words
"Type a question for help" box
Our Design Tenets (Summer 2003)

- A person’s focus should be on their content, not on the UI. Help people work without interference.
- Reduce the number of choices presented at any given time.
- Increase efficiency.
- Embrace consistency, but not homogeneity.
- Give features a permanent home. Prefer consistent-location UI over “smart” UI.
- Straightforward is better than clever.

from Jensen Harris’ presentation, The Story of the Ribbon
<table>
<thead>
<tr>
<th>UX PRINCIPLES FOR WINDOWS SEVEN</th>
</tr>
</thead>
</table>

**Reduce concepts... Increase confidence**
- Have I introduced a new concept?
- Why? Is it necessary?
- Can we get rid of a few that we have?
- Am I making meaningful distinctions?
- Does the UX continue the same concept?

**Small bad and good things matter**
- What are the important “small things” seen often or by many?
- Small bad not good; good not bad.

**Lifecycle of the experience**
- Consider your experience at all stages of UX Lifecycle

**Solve distractions not discoverability**
- Reduce distractions
- Don’t compete with ourselves
- Commit to new functionality
- These are not solutions
  - Put me in the Start Menu
  - Put me on the desktop
  - Put me in the system tray
- I need a balloon
- I need a first run experience
- We’ll make a tour

**UX before knobs & questions**
- Turn down the volume of questions
- Ask once
- Don’t require configuration to get value
- Who else is asking already?
- Look for opportunities to consolidate

**Personalization not customization**
- Is my feature one that should allow the user to express an element of themselves?
- Have I made the distinction between personalization and customization?
- If yes to personalization... does it have to be a new creation or can it simply be integrating the low-hanging fruit (location, background picture, tile)?

**Be great at “Look” & “Do”**
- What is your UX great at?
- Does it do all the things you need it to do? Can it do anything else?
- If yes to both, does it do it well?
- Design for what you want it to do
- Put it out in the world
- Because nothing is perfect
- Love it, hate it

**Building for mobile people**
- All UX principles apply equally at 12” and 20”

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from Stephan Hoefnagel’s presentation, *Designing the Windows 7 Desktop Experience*
Microsoft strives to build products that are accessible and easy to learn and use. We are continually working to demystify technology and make it more accessible to people, regardless of their physical abilities or their economic, cultural, or educational backgrounds.

Among the other innovations we continue to build into our products are a wide range of accessibility features that make it easier for people with physical or cognitive difficulties, impairments, or disabilities to use a computer and customize their work environment. We also work closely with companies that design and build assistive technology devices—such as screen readers that convert text to speech for people who are blind or visually impaired—that run on the Windows platform and enable people with disabilities to perform a wide range of tasks and access information more easily. Accessible and assistive technologies are designed to help people with disabilities unlock their potential and optimize their abilities.

When Mumtaz Lakhani emigrated from East Africa to Canada in the 1970s, for example, she had a college degree in business administration and a severe visual impairment that made it difficult for her to find a job in her field because she was unable to use the computer systems at the companies where she applied. With the help of the Canadian Institute for the Blind, she found a job with RBC Financial Group, where her first assistive device was a handheld magnifying glass. Today, she uses a standard PC running Microsoft Windows XP and screen magnification software from Ai Squared, which gives her the same access to materials that her colleagues have.

When Satoshi Fukushima was born in Kobe, Japan, in 1962, his world was like that of other children, filled with bright colors and the sounds of laughter and loving voices. But by age nine he had lost his sight, and by age 10 he had lost his hearing as well.

“When I describe my world, I use television as an example,” Fukushima says. “A television that has no picture is in a state similar to that of being blind. A muted television is similar to the condition of being...
Simple Unexpected Concrete Credible Emotion Stories
Four ways of thinking of design
1. Design as aesthetics
2. Design as a distinct role
3. Design as a thing
4. Design as a rock star
We think there’s a new way

1. Design as aesthetics
2. Design as a distinct role
3. Design as a thing
4. Design as a rock star
5. ???
Design as an activity

Design can be an activity that an organization embraces, that everyone can be involved in.
Design is a team sport

In order to address the complexity of our challenges, we must widely draw from cross-functional teams.
Designers become facilitators

We engage these teams, get design ideas out of them, and then work to refine and hone them.
Target A Guest

METFORMIN 500MG
Tablet Generic for: Glucophage

Take one tablet by mouth twice daily with meals

qty: 60
refills: Yes to 07/12/07
Dr. C Wilson
disp: 07/12/07 TST
mfr: NDC: 00093-1048-05
(877) 798-2743 6666057-1375
TARGET PHARMACY
900 Nicollet Mall
Minneapolis, MN 55403
customer facing

pill bottle

pharmacists

ClearRX marketing

IT systems

CRM

POS system

supply chain

training
To make Target the preferred shopping destination for our guests by delivering outstanding value, continuous innovation and an exceptional guest experience, and consistently fulfilling our Expect More. Pay Less.® brand promise.
Making this work will be messy...
1. Create a team
2. Engender empathy
3. Articulate a vision
4. Make a thing
And don’t forget...
Deborah Adler:
[The pharmacists] were the most important people to us, they were the **front line**. They had to explain how to use this new system.

Herb Kelleher, founder of Southwest:
If you create an environment where the **people truly participate, you don’t need control**. They know what needs to be done and they do it. And the more that **people will devote themselves to your cause** on a voluntary basis, a willing basis, the fewer hierarchies and control mechanisms you need.

customer experience is made of people!
Prepare for a slog.
How many of these firms’ customers agree that they deliver a superior experience?

8%
Thank you!

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