

# openSAP Invites Thought Leaders, Episode 17

## HOW TO PROVIDE AN EXPERIENCE THAT DELIGHTS YOUR CUSTOMERS

### Transcript

**Jeannie Walters:** Instead of just reacting to when things go wrong, customer experience is also about intentionally and proactively designing the experience and then improving it based on listening to your customers, based on understanding how their expectations are changing and things like that. So, I like to say customer experience is a mindset, it's a strategy, and it's a business discipline, because that's when you see the real power of it. It's not something that is just talk. You need to actually put action and planning and strategy to it.

**Elisabeth Riemann:** Welcome to a special Thought Leaders episode with Jeannie Walters, CEO and Founder of Experience Investigators. In this episode, Jeannie explains how by understanding our customers' journey and their personal experience, we can develop strategies to exceed their expectations, delight new and existing customers alike, and get everybody excited about our brand. So, it's time to flip the script and focus on those who really matter for our business, our customers. I'm your host, Elisabeth Riemann. Let me introduce you to Jeannie Walters. Jeannie Walters, CEO and Founder of Experience Investigators, has spent more than 20 years evaluating and improving customer experiences and teaching her trademarked methodology to enlightened leaders in many industries. She's a Certified Customer Experience Professional, a charter member of the Customer Experience Professionals Association, a Professional Member of the National Speakers Association, a LinkedIn Learning Instructor and TEDx speaker. Jeannie is passionate about improving the everyday interactions we all have as customers and writes, speaks, studies, and trains on customer experience issues around the world. Let's say hello. Hello, Jeannie, welcome to openSAP Invites Thought Leaders.

**Jeannie Walters:** Thank you so much for having me, Lizzie, I'm thrilled to be here.

**Elisabeth Riemann:** It's our pleasure. Jeannie, in your openSAP nutshell course, Understanding Your Customer's Journey, you provide us learners with a toolkit of techniques to better understand the individual journey of our customers and by showing

us how to focus on our customer's needs, you're helping us deliver a better customer experience, which you tell us in turn can encourage their long-term loyalty and also lead to higher revenue. Aply, I think, in-keeping with your customer and learner-centric focus, you and our project manager, Claudia Weller, asked learners of this course in a poll which topics they would like to learn more about in today's episode and the topics they chose are Customer Experience Strategy and Customer Journey Mapping: Drive Action with Results.

**Jeannie Walters:** Excellent. I can't wait.

**Elisabeth Riemann:** Before we dive in though, Jeannie, I do have a warm-up question for you, and what I really love about the course is the storytelling techniques that you use and you share a lot of stories with our openSAP learners. So, I was thinking to set the scene for all our listeners, and not just learners of the course, would you like to share a personal story of a particularly memorable journey?

**Jeannie Walters:** Sure, yeah, that's such a great question and I do when I tell stories about, you know, journeys that you would be familiar with, travel and things like that, there are so many similarities to a customer journey and that's why I try to incorporate those things. And, you know, when I was first starting my career, I was moving from Minnesota in the United States to Las Vegas to Nevada. And back then it was before really good mobile phones, it was before GPS, all of those things. And so, my company basically said, get a map and we'll see you in Vegas. And I had never done a trip like that on my own. And so, it was such a great learning experience because about halfway through I had mapped it out in a very logical way. But about halfway through, I was thinking, you know, all I've done is drive through cornfields in Nebraska and it's not very exciting and we have this amazing country to see. And so, I totally changed what I was doing. And I went through the Rockies and I just was able to go up to parts of Utah. I saw Zion National Park, which is an amazing place, and I would stop and take these little hikes on my way. And it's such a special memory. And what I realized was, you know, you can plan very logically for everything, but that's not what moves people. People are moved by emotions and experiences. And that's what happened with that trip. It could have just been something that I did, and I checked off the list. Instead, it's just like wonderful memory of exploration. And also, it was confidence building for me, frankly, to be on my own and travel like that. And so, I think it's just a gift when we have

those opportunities to think about the journey and then to shift gears and do what really moves us.

**Elisabeth Riemann:** Absolutely, and I think it's so important that you take the time and you plan in certain detours then as well. How long were you on the road for, Jeannie?

**Jeannie Walters:** I believe it was four, they gave me four days and the first day was literally just like driving through very flat plain scenery. Yeah, it was not very exciting. And I was staying in these kinds of motels because I hadn't planned that part of it very well where I was going to stay. And yeah, it was it was really exciting to just make that decision and go for it.

**Elisabeth Riemann:** And it's amazing and are you a good map reader?

**Jeannie Walters:** Oh, that's an unfair question.

**Elisabeth Riemann:** I'm not.

**Jeannie Walters:** I am not at all at all, and yeah, I definitely still need my GPS everywhere I go now, so I'm grateful for that. But, yeah, I was just able to kind of look at the big highways and get myself there.

**Elisabeth Riemann:** Excellent. And Jeannie, you are CEO and Founder of Experience Investigators, and your motto is Create Fewer Ruin Days for Your Customers. And I love this. Can you tell us how this motto came to be?

**Jeannie Walters:** Sure, yeah, we actually call it not just a motto, but a mission. Our mission is to create fewer ruined days for customers because when we talk about customer experience, sometimes people categorize it as customer service, just that reactive helping customers or they talk about it like it's, you know, it's a nice to have it's not necessary for business or for people. And what I really am motivated by is thinking that we are delivering experiences for individual people, individual human beings, and how what a great responsibility that is, first of all, but also what a gift that is to think about. If we can reduce the effort for somebody, if we can help them have a little bit better of a day, then they're going to take that energy into the rest of the world. And so I

get a little lofty about this, but I really do believe that we can create a better world if we reduce the amount of ruined days for people, because you think about your challenges as a customer and often those are moments that kind of pile on throughout a day. And, you know, in 2012, now, I did a TEDx talk about this idea, and one of the things that I talked about was like when we come home to our family and we've had one of those days where we're like, oh, I got a parking ticket, and then they got my coffee order wrong, and then this happened, and the dry cleaning wasn't done when they said it was going to be gone. When we come home, that's what we launch into. Right. Like we want somebody to say, you know what, that stinks. And but you want somebody to know. Like, it wasn't just this one thing. It was all of these things that ruined my day. And if we could make sure that day goes better, then that person is going to walk in and have a totally different experience with their family. They're going to treat the person at the coffee shop differently than if they came in with a negative experience. And so, I really do believe that we have an opportunity to create a better world by creating better customer experiences. And so that's what moves us. And that's I mean, we use it in my organization. We use it as a mission. And it helps us make decisions even about what clients we work with and what projects we do because we want to live up to that mission.

**Elisabeth Riemann:** I think it's a fantastic mission to have, and I think it's like you say, it's the butterfly effect that small tasks, more gestures can make a really, really big difference to not just one person's day, but many different people who interact with that person too.

**Jeannie Walters:** That's exactly right.

**Elisabeth Riemann:** And milestones, we're talking about journeys a little bit today and milestones are important along any journey. And I'm really interested to hear if you could talk us through some of your personal milestones and how you founded Experience Investigators?

**Jeannie Walters:** Yeah, I love this question, too, and I, I always wish I had, like a better founder's story so I could be like, oh, I was I was struck by this idea. Essentially, I've been doing this type of work for about for more than 20 years now. And I was running a bigger agency type organization with my brother, actually, we were partners. And it was

2008 and the financial crisis happened. And I started seeing how customers were getting more and more access to brands in ways that they never had partially around social media, because they could reach out to brands that way, and partially because there were leaders who were figuring out that if we invest in customers, if we invest in customer experience, we actually get better results. And so, I kind of saw that happen and decided, you know what? Let's just, let's just see what we can do to bridge that gap between customers and brands a little bit more. And when I started this company, I really leaned into sharing to being on social media, answering questions. And I got one of my biggest clients on Twitter that first year because I didn't know who they were. It was just a personal Twitter account. But she was asking questions about how do you understand the customer journey and who, you know, who do you turn to for this? And I just was interacting. And she reached out and they became a client of mine for about five years. So, when I think about that, what I realize is there is so much power in abundant generosity. Like if we are if we are holding on to our knowledge and to our expertise and not sharing it, then we're missing opportunities not just to share it with the world, but also people really need this and they appreciate it and it leads to good things. So that's kind of been my philosophy since we started.

**Elisabeth Riemann:** And that's a brilliant philosophy, as well as helping other people, it makes you feel good yourself, and we've all been in situations where we've been reliant on the help of others too.

**Jeannie Walters:** Absolutely.

**Elisabeth Riemann:** A slightly related question off topic, what was it like working with your brother? What's it like working with a family member?

**Jeannie Walters:** Yeah, I get that question a lot, too. We actually worked together for about 12 years. It was it was great. We are very complementary in some ways. There are five kids in my family and I'm the youngest and he's the second. And so, we didn't have a lot of the power struggle that I think people who are closer in age have because there's about ten years between us. And he started the company and then he invited me to join him. And after a few years, that's when we became partners. And I think what it taught me was, first of all, you know, communication is key in any relationship, and especially in something like that. You really have to be authentic and honest and know

that and trust the other person's intentions, and we did great, we really did, but. And it was hard not, you know, at the end of that, it was hard, I think. But we both took different paths. We still talk to each other. We see each other at Thanksgiving, all those things. So, yeah, it's all good.

**Elisabeth Riemann:** Thank you. Jeannie, so let's turn our attention now to the topics chosen by your learners and maybe let's start by clarifying the terminology. So, what exactly does customer experience, CX, exactly mean?

**Jeannie Walters:** Hmm. So, customer experience is about the entire relationship that a customer has with the brand, and that means every interaction, every touchpoint, every piece of communication, customer experience starts way, way, way before the sale and it goes way after. And so, we have to recognize when we talk about things like in sales, you'll hear things like the buyer's journey. And that kind of stops when they make the sale, or we'll hear about onboarding after that and what customer experience is about looking at that expanse of how do they interact with the brand and what perceptions and emotions do they walk away with? Because as they're having these moments with your brand, emotions are happening positive and negative. And we want to make sure that we are, you know, intentional about customer experience. So instead of just reacting to when things go wrong, customer experience is also about intentionally and proactively designing the experience and then improving it based on listening to your customers, based on understanding how their expectations are changing and things like that. So, I like to say customer experience is a mindset, it's a strategy, and it's a business discipline, because that's when you see the real power of it. It's not something that is just talk. You need to actually put action and planning and strategy to it.

**Elisabeth Riemann:** It's a lot harder, I think it's.

**Jeannie Walters:** It is, I hate to say that, but you're right. Yeah.

**Elisabeth Riemann:** And you touched a little bit there at the fact that it's not just the buying experience, it's not limited in the experience to one particular phase. So how does that fit in with what exactly a customer journey is? Where does this start and where does it end?

**Jeannie Walters:** Yeah, customer experience is kind of the umbrella, the discipline, the strategy over it, but the customer has a journey with your brand and that's everything from when they first become aware. So that could be walking by an office building and seeing the brand. It could be seeing an advertisement all sorts of different ways. And it goes all the way through to when they leave you or when they are loyal forever. It's more likely that they're going to leave you at some point. So, we have to consider that part of the experience, too, because we want them to walk away and feel really good. And so we look at things like if you think about your customer's journey, you have to kind of flip the script, because often we are, like my clients sometimes will say, oh, we did journey mapping here, look at the customer journey. And it's actually all from the organization's perspective. Sometimes I call this journey mapping by org chart because we actually will say things like, well, this is when they're under, you know, this is when they're marketing. Then we move them here. Then we, you know, the sale happens and then we move them to account management or customer success. The customer is not experiencing that. The customer is experiencing. Oh, my gosh, I have this need. I've got to figure this out. I have to comparison shop. I have to buy this thing. The buying process is really long and cumbersome. And so that's degrading that journey. That's making them think like, oh, I don't I don't know about this. So we have to really think about what is the customer thinking, feeling and doing and where are those pain points and where are those moments of opportunity that if we expanded some of the ways that some of the positive things that happen, what would that do for the customer journey? So, you know, the customer journey is so important, but the customer experience is kind of that umbrella that goes over all of it.

**Elisabeth Riemann:** Fantastic summary for us there. And a side question, have you been inspired by particular brands and the way they handle and approach, customer experience? I guess you can never turn off your own expertise and fascination with the topic.

**Jeannie Walters:** That's true.

**Elisabeth Riemann:** So, what's that like?

**Jeannie Walters:** Yeah, I mean, definitely, and some of the you know, the usual suspects, you know, Amazon, Zappos, Southwest Airlines here in the United States,

and they do a great job and they put a lot of effort into who they hire and how they hire and also their internal processes to support the customer experience. So those are kind of the standards. What I like to look for are those moments where you think, wow, that's so creative or that's so interesting. And some of the local places do a great job. Some of these independent stores like you think about how does a small business survive when there are the Amazons of the world? And there was a toy store here in my town that started this whole thing around the holidays where they said, OK, you don't want your little ones to find all these gifts. We will wrap them and store them for you, and you can pick them up on Christmas Eve. I mean, stuff like that. There is a Mexican restaurant here and the chef is just this larger than life super friendly guy. And everybody knows Chef Paco because he's just this warm, incredible person. But he also is an incredible chef. So, he doesn't lose sight of the fact that, you know, if you go to a restaurant. Yes, it's part of the experience, but the product has to be really good, too. And so, I like that. Like, it's all together in his restaurant, too. So, I think there are so many great examples like that where if your expectations are exceeded, that's going to be what delights you. And so, everything is based on expectations. And so, if you expect, you know, to go to a restaurant and have food, those will be met. Right. But.

**Elisabeth Riemann:** It's low expectation.

**Jeannie Walters:** Yeah, exactly, but if you have exceptional food and exceptional service, that's an experience that you remember. And so, we really have to think about what expectations do our customers have? What promises have we made to them? What's our brand promise? How to what are we putting out to the world if we say we're faster than everybody else, we better be faster than everybody else. And if we can't live up to that, we have to stop saying it. So, it's really thinking through that type of thing. But yeah, I'm always looking for great examples of moments of delight and things like that.

**Elisabeth Riemann:** And I like the way you focus on delight, because that's the real differentiator, isn't it?

**Jeannie Walters:** Hm.

**Elisabeth Riemann:** And that's what keeps us coming back and going to the same places and recommending them to our friends and family too.



**Jeannie Walters:** That's exactly right, and I think that, you know, there if we can reduce the effort for customers, if we can reduce the need for service, then that creates more opportunities for us to create those moments of delight, to create those moments where they're going to talk about it, they're going to recommend it. They're going to refer it. And if you look at things like software as a service, you know, renewals are a big deal. Right. So instead of just contacting somebody and saying, hey, it's time to renew, we need to backtrack and look at what is that journey and how can we support them where they need us the most? So, it's really thinking through not just the forward-thinking journey, but also learning from all the different places where customers are interacting and giving us feedback whether they know it or not. They're giving us feedback.

**Elisabeth Riemann:** And I think it's a nice segway then to look at the overall CX strategy, so what exactly we can expect from it, what it is and what it's not. Can you talk us through the strategy and the importance there?

**Jeannie Walters:** Yes, this is one of my favorite topics, because I think a lot of times people think CX strategy, what is that? That's and this is where it really does take some discipline and some business rigor to really make things work. But what I always recommend is you start with your overall organizational goals. You look at what are we trying to do as an organization? What's our vision? You know, what are our values? You kind of have to start there with everything and then you want to figure out, OK, what would drive that goal? So, if your goal is to just because I just said it, increase renewals, you know, like if that's a big goal for your organization, well, how could you increase renewals? Well, you could check in with people more? You could remove some of those those challenging touch points in the journey that you know about. You can improve the experience to the point where they don't have to call service, where they don't need that support. So, if you look at your customer journey and you say we're going to improve these things, you can also figure out how do we measure that success? And that comes in with things like net promoter score or customer satisfaction rate. There are there are different CX metrics that can be really helpful there. And so, then you can start thinking, OK, if we increase our net promoter score by just a little bit, we believe we could increase our renewals by one percent. Well, what would that mean? And so, you kind of follow that thread and then you come up with a strategy where you say, we know that we want to reduce effort for our customers, and we want to make sure that they're

incredibly happy before renewal. We're going to do that in this way. And that's when you come up with a plan and you really get into the details. But essentially, you're putting a stake in the ground and you're saying by investing in our customers, we will get business results, and this is how it's going to drive our overall organizational goals. Now, the only caveat I'll say here is, people still don't think of CX this way, so it's a little bit of an education and communication strategy that you need to do as well and think about what your leaders care about. Your chief financial officer might be really excited if we could say we're going to reduce the cost of service in the next year by investing over here. That's you know, everybody wants to reduce expenses. If you are talking to your chief revenue officer or your chief sales officer, you might say, you know what, if we can increase renewals, we also think we can increase referrals. And so that's going to help with our acquisition goals. So, you have to, I mean, being a CX leader is challenging because you do have to kind of think about the entire organization and the entire customer experience. But if you can break down your strategy to make sure that it's about living up to those goals, and I always recommend to get really specific, if your CX strategy is have great CX, nobody knows what to do with that. That's not specific. So, if you can say we're going to reduce effort and improve NPS and everything we do in the next year is focused on that, that's what gets people really on board.

**Elisabeth Riemann:** So it's not just looking at the vague, big picture of where you want to be, it has to be measurable, it has to be focused and specific and really give you bite size chunks, I guess, as well that you can work towards and really drive an impact there as well.

**Jeannie Walters:** That's right, and I like to think about like, OK, what do we want to do for, you know, in a year and five years and 10 years? And if you can start looking at things that way, that can also help you break things down, because it's a lot. And if you're starting from scratch, you need to get these foundations right and it can take time. I mean, we're talking about changing culture in a lot of in a lot of ways. And if you've always been a product-centric organization, you can't just make an announcement, be customer-centric. Right. So, but I think that's been the strategy that some leaders have kind of hoped for because we see that a lot where they say, well, now we're thinking of customers, but they don't give any resources or tools or instructions or anything. And that's why defining your own customer experience strategy and getting clear about your goals, it can really help move everything forward.

**Elisabeth Riemann:** And I think it's taking away that part that could be quite overwhelming when you set out right and you want to do everything, achieve everything, make people happy, but it's really about breaking it down and really kind of dividing it into achievable goals over a certain period of defined time too.

**Jeannie Walters:** Mm hmm. And I think unfortunately, or fortunately, we've been kind of drowning in data for the last several years and data is fantastic. It's really necessary. But that's not a customer experience strategy, because that's the other thing I see sometimes is they'll say things like, well, our strategy is to, you know, improve NPS by whatever. And I'm like, that's great. That's great goal. But how will we do that? And how does that reflect on the overall goals and the vision and the values of our organization? Because we have to make sure that's all aligned in order to get employees really engaged and in in order to start changing that culture from, you know, the old way to the new way. So, it just takes time.

**Elisabeth Riemann:** Yeah, and really making the human-centric approach as well and thinking where the data comes from and who applies to.

**Jeannie Walters:** Yes, that's a great, great point and yeah, numbers are not numbers when you're talking about this. They're people, their feelings, and we need to respect that.

**Elisabeth Riemann:** More complex. Jeannie, we have the term customer journey mapping, I'd like you to walk us through the main ideas behind this and also explain to us how it connects to the topic driving action with results.

**Jeannie Walters:** Mm hmm. Yeah, customer journey mapping is a technique. I like to say maps are a tool, not an artifact, because sometimes what you'll see is somebody creates a journey map and it becomes kind of a poster on the wall, but nobody does anything with it. So, journey mapping as a technique is really about understanding from your customer's perspective what this journey is actually like for them. So sometimes you can't do that for all customers all at once. Sometimes, you know, you might do this by persona, you might do this by industry. You might do this by a specific part of the journey. So, as you're walking through their journey, again you're flipping that script,

you're thinking about what's what are they actually thinking, feeling, doing? You identify pain points, you identify parts that are opportunities, and then you act on those things. And with journey maps can be anything from you can do them, you know, with pen and paper and Post-it notes all the way through to now there are some amazing tools out there that actually will also grab data from other places. So, you might include your NPS score or other CX metrics at key points in the journey. You might include feedback from customers. You might include operational metrics, like how many people are calling your service line. And you know what, what are we going to do about that? So that technique helps you then kind of measure and prioritize those improvements you want to make to the journey, because it's really easy to come up with a journey map and think, oh my gosh, we've got two hundred improvements that we need to make by knowing your goals, by knowing the scope, and by knowing kind of the willingness of the organization to invest that helps you prioritize those things.

**Jeannie Walters:** So, when we use journey mapping the right way, it's all about finding those places where we can either quickly make improvements. And there are always quick wins in journey mapping. There's always one or two or ten things where everybody's like, why haven't we done that? That's why we should do that. And so, you can just flip the switch and make it happen. And then there are longer term initiatives that might require system changes and big things. So, you know, driving outcomes there is about, OK, if we do this, you know, if we make these improvements, we believe we're going to get these results. This is how we're going to drive those outcomes. So that's where I, that's why I stress that it's a tool, because I think that it's really easy to get very into the weeds and want to make the perfect customer journey map. But if it takes you years to do that and you never take action on it, that doesn't do anybody any good. So, I encourage people to think about journey mapping as a tool in a technique to drive those actions that become outcomes.

**Elisabeth Riemann:** That's so helpful because I think otherwise the tendency is really to get stuck in the details down with the weeds, not being able to get out of this, knots, I guess, in some case as well. And I really like the emphasis that you say it's about mapping things out. It's the route to get to somewhere to really drive these improvements too. And if you're doing customer journey mapping for the very first time, what technique would you recommend to us there? If we're feeling a little bit overwhelmed, where do I start? What's your recommendation?

**Jeannie Walters:** Well, know your goal, that's number one, so why are you mapping and if it's because you heard that journey mapping is a good idea, that's not necessarily the right goal, like know exactly what you're trying to achieve. And that could be something like, you know, what we know are on boarding process. We are getting a lot of complaints. We want to fix that. That's a fine goal. But sometimes what happens is people say, oh, you have to do an end to end journey map or you have to do it for all your customers. I'm not that much of a purist. I think that, you know what? This is, again, a tool to move forward. So, think about your goal. Think about the scope, because it can be really easy to all of a sudden want to do it for every single persona or every single product. You really want to kind of narrow it down, especially for that first one, and then identify those phases from your customer's perspective. And the ones I typically start with, I'm just going to run through them here are awareness, which is where they're becoming aware of your brand. Consideration, which is where they start thinking, hey, maybe this is for me. Selection, which is where they're comparison shopping and they're figuring out exactly what they need. Purchase and then after purchase, it's really about kind of what industry and everything else you're in. There might be an onboarding phase. There might be, you know, it might be super easy and transactional. And they get their purchase and they walk out of the store. So, you have to kind of look at those phases. But ultimately, you want to move them through beyond satisfaction, because satisfaction is not an emotional response that's just meeting expectations, into loyalty and ultimately advocacy. How do you get customers who are so excited that they're telling everybody about your brand? So, if you use those as kind of your structure, then that can usually help you figure out, OK, what are we mapping and what are they thinking? And so, you want to make sure you have rows or different areas where you're capturing what are they thinking? What are they doing? What are they feeling? Which is super important and where are those pain points? You can also track things like channels. You can do all sorts of things. But keep it simple when you're starting, keep it simple, know your goal, know your scope, and then use the feedback and the data and the observations that you already have. Sometimes we go in there and people act like, well, we have to start from scratch. You have information. And the other thing I like to say is, you know, I've done many, many journey maps. And when I work with teams, I have yet to work with a team where we start. And there's not one thing that somebody says, you know, that's a terrible thing. Yeah. And nobody's like, yeah, that's terrible. That's awful. We shouldn't treat customers that way. And then

somebody will say something like, well, we should send out surveys to find out. And I'm like, we all agree.

**Elisabeth Riemann:** I

**Jeannie Walters:** This

**Elisabeth Riemann:** Was.

**Jeannie Walters:** Is terrible. So, there's no need to, like, get extra data if you know what you really want to do.

**Elisabeth Riemann:** I find that so refreshing because I think we've all been in these meetings and this discussion, it doesn't even have to be in the corporate world, it could be around your family's dinner table. Right. It's like how much? If we all have a common opinion, how much more consensus do we need? How much additional proof are we looking for? Or do you just want to make the change? Now it's.

**Jeannie Walters:** Yeah, it's exactly right and I think because there's so much data and there's so much opportunity to get data, it's really easy to fall into that. But then I've also seen where we become very metrics centric, where we say things like, oh, our NPS went up 0.01 percent and we throw a party, but we don't know why that happened. And then if it goes down the next month, we don't explore that. And so, we really have to think about these metrics and measurements and data. As you know, they're telling us something. They're giving us insights. But then we need to act on that insight. We can't just be satisfied reporting out numbers all the time, which happens a lot, unfortunately.

**Elisabeth Riemann:** I guess we shouldn't settle then, as you said, for satisfaction.

**Jeannie Walters:** Oh, no, no, satisfaction is not what we're aiming for, and it's really that's it's like if you went into a bank and they said, yes, we will hold your money. Yes, that's what a bank does. And so, you know, that's satisfaction. But if you go in and they, you know, it's an experience and they proactively help you plan and they reach out to you, that's exceeding those expectations. So, satisfaction is not the end game at all, and that should never, ever be our goal.

**Elisabeth Riemann:** And I love that example that you share with us as well, that makes it really easy to remember. I'm going to talk now about one of the frequently asked questions in the course. And it's the fact that the learners come from many different industries and different market sizes too so small, midsize, large. And one of the most popular questions was, if really one single tool, namely the customer journey map, can this one tool really be used to address all these really different situations?

**Jeannie Walters:** Mm hmm. Yeah, you know, when I speak, a lot of times somebody will come up to me and say, well, two things happen. What somebody comes up and says, well, where B2B, so this is different. But it's not really different because businesses still have people in them who are making those decisions, who are the end users and everything else. So that happens. And the other thing that happens is they believe they already know enough. They say like, well, we don't have to do journey mapping because we know our customers really well and they love us. They love us! And it's really easy to kind of stay in that mythology. And if you have a culture where you talk about customers a lot, sometimes it can feel like, oh, yeah, we're totally on this. A tool like journey mapping or some of the other things that we talked about in the course like service blue printing and other things. What that does is it helps all of us get out of our perspective a little bit and learn about who our customers are. So, in, you know, a journey map for that local restaurant I was talking about would be very, very different from, you know, something for SAP. That would be very different.

**Elisabeth Riemann:** Hmm.

**Jeannie Walters:** But there are ways you can do this and kind of layer things on. So, by starting somewhere, you can always evolve and add personas and add different product lines and add these different journeys to really understand customers. So, it's not that it's going to look exactly the same or be the exact same outcome, but it's going to serve the same purpose. And that's really understanding our customers and seeing where we can exceed their expectations, live up to their expectations, in some cases, fix what's broken, all of those things so that they can move forward on their journey in a way that doesn't ruin their day. Right. Like that's what this is about.

**Elisabeth Riemann:** That's what the mission is. Excellent, and Jeannie do you have some examples from your consulting experience that you could share with us, because I think tangible examples, some of which you've already provided, they go so far in helping us understand something, but also helping us to remember it too.

**Jeannie Walters:** Sure. Yeah, I think one of the things that I think we do as business people, because we've been taught this way, is we think about kind of the journey of an organization as marketing, sales and then, hey, there are customers. And we don't get into the nuance of what happens and where there's opportunity. And so, I worked with a fitness brand. And one of the things that we discovered through journey mapping and by journey mapping, it's not just like sitting down with pen and paper, we actually did a lot of observational work, like I hung out in different studios, I took classes, I got to know different instructors, all sorts of things. Reviewed online reviews, looked at the people who had left and what they said in their exit interviews. And what we realized was there was this like dramatic high when people joined because they were really excited. They had this feeling of like, I'm doing this, and it was high energy, really happy. And they would stay that way for about three to six months, especially if they were attending regularly and they were really into it. But then something happened and what usually happened was neglect. And I think this is where we have to think more about our customers, because it's so easy to just think that if we're invoicing them every month, well, then they're a customer. Right. And

**Elisabeth Riemann:** Yeah.

**Jeannie Walters:** But we have to think about how can we keep them into that phase where they're high energy, where they understand and they're super positive about it. And so, we literally talked about like, OK, we've got this category of customers now who are drifters. They're going to drift away from you. They're not going to complain. They're not going to make a big deal. They're just going to drift away. So, we were able to identify that segment and when approximately that happens in the journey. So then we could empower all the studio people to say, put something in your process for more outreach here, for special classes, for people who have been, you know, with you that long and they were able to really retain a lot more of their members because they were thinking about that moment of neglect and the very definition of neglect is not thinking about it.



**Elisabeth Riemann:** No.

**Jeannie Walters:** So, if you put some energy and some positivity in those moments of neglect, you can make dramatic changes for your customers and for your organization.

**Elisabeth Riemann:** It's a real deal changer, isn't I think, and I think we've all been in similar situations as an existing customer. If you regularly subscribe to your favorite magazine, you see how the magazine, the publishing house is trying to attract new readers. And then you see that the gift that they get, and all the goodies and you think, well, what do I get? I've been paying my monthly subscription for so long

**Jeannie Walters:** That's right.

**Elisabeth Riemann:** And then this neglect feeling kicks in. Right.

**Jeannie Walters:** Absolutely, they're telling you you're not very important. I mean, essentially, that's what neglect is saying.

**Elisabeth Riemann:** And Jeannie, in the course, Understanding Your Customer's journey, you say specifically to invest in your customers, it's important to define what that investment will bring to your business. And I think that fits in maybe with what we've just discussed here now as well. Can you elaborate a little bit more?

**Jeannie Walters:** Sure, yeah, I think this all comes back to understanding your organizational goals and getting really specific, because I have seen so many, I mean, there. I worked with an insurance company, and when I walked into their beautiful headquarters, there was a marble wall and they had etched in their vision and values and everything. And the vision was something like, we're going to be the best. I mean, it was it was something so generic, and if you look at a lot of company missions, this is why I encourage you to write a customer experience mission, because if you look at a lot of company missions, they say things about stakeholders, they say things about the internal or they say things like we're going to be best in class. That doesn't really mean anything. And often they don't even consider customers as part of that because we've been trained not to think of this. It's crazy, but it's true. If you look at a business plan

template, it goes through marketing, acquisition, getting customers, and then it flips and talks about internal operations. And so, we literally don't think about this. So, if you deliver on that customer experience mission, if you really define that, what who are we for our customers? How are we going to show up for our customers no matter what? And how does that tie to our goals and the outcomes that we want? Then you can get really specific about those next steps to take, you know, and what that means and how to measure that success. So, I think it's often overlooked in customer experience because it's really easy, unfortunately, to start with a tactic instead of a strategy. So, people might hear something like a journey mapping. We've got to do a journey map. And so, they start there, but they don't know what their overall goals are in doing that.

**Elisabeth Riemann:** This inside out approach and I think, Jeannie, if you want to start a grassroots initiative and we want to kind of really drive positive change, it's not always the CEOs who are saying we need a customer experience strategy. I guess. What about our listeners who say this is a fantastic approach, I wish my company did this. What would your advice be to us there?

**Jeannie Walters:** Mm hmm. I love this question because I think there are, you know, customer experience change agents in every organization and they're just waiting to be empowered. And I have seen things that are kind of remarkable, starting with either a team or a person who starts to really communicate and educate about customer experience, starts to tie their own results and those discussions back to customer experience. There is one example where it was a logistics company and they had a big contact center in the middle of their headquarters, and they realized that they were not as being as responsive as they needed to be to the people they were serving. And so, the team leader created her own customer experience mission for them, created their own goals, did this all on her own. And what happened was it was almost like osmosis because they were in the center of the building and they started putting signs up. They started communicating about great feedback they were getting from customers. They started almost like a communication strategy inside the organization, and eventually it kind of grew from there. And so, people were more and more on board with this idea. So, when we're talking about kind of bottom up, it is a lot harder. You do need to get your leaders to buy into this eventually because you need that investment and you need the resources. But if you can make the case over and over and over, you're more likely to get that buy in eventually. So, I would say communicate. Another idea that I love is

I've seen some lunch and learns where they just say, hey, we're going to share the feedback that we got from customers this month. Anyone is free to join us. And so, you just tell customer stories because that's humanity, that's emotional. And so that can be a really great way to do it, too. So sometimes you need to be a little scrappy, but it makes a big difference if you can start with your team, your role even.

**Elisabeth Riemann:** There's some really brilliant ideas. Thank you, Jeannie. And now our call to action that we always like to include in our episodes too. For learners who are enrolled in the course, what do you recommend as next step for us once we finish the course? Can you recommend some additional learning materials and exercises for us?

**Jeannie Walters:** Sure, yeah. I think, you know, make sure you've gotten those foundations right, so if you don't have a customer experience mission, if you don't have a customer experience strategy statement, it's time to do that. We do have resources on our site at Experience Investigators to help you do that. So, I would start with that foundation and I would think about where do you want your customer experience to be in a year or in five years and start backing that up with a real roadmap, real steps, all of those things. And that last thing we just talked about is so important. So, if you don't know where to start, I would say communicate, educate, and ask people to get involved. Like open up the tent because you need so many leaders to really make this happen. Don't hold any of that back. And if you haven't already, you know, try journey mapping, try that, and figure out what your customers need from you. But take that step first and get that goal right and that scope right. So that you don't get overwhelmed. So, you know what that journey map will lead you to.

**Elisabeth Riemann:** And thank you for giving us the courage to do that as well, it's so motivating, Jeannie.

**Jeannie Walters:** I'm glad you know; this is what it's all about.

**Elisabeth Riemann:** One extra thing I'd also like to mention, Jeannie, you have a podcast, Crack the Customer Code, and I'm sure our listeners and podcast fans will be interested in your series, too. So, can you tell us more?

**Jeannie Walters:** Sure, yeah, Crack the Customer Code is a podcast, I've been co-hosting with Adam Toporek, who is a customer service expert, for about five years, we bring on people who are leaders in customer service and customer experience. We also just kind of riff on certain things in the news and things like that. We have a lot of fun. And so, yeah, I would love if you found us anywhere you listen to podcasts. Our next season is coming up, so it's exciting.

**Elisabeth Riemann:** Excellent, so we'll include all those links in today's show notes too.

**Jeannie Walters:** Great.

**Elisabeth Riemann:** So, Jeannie, to summarize today's episode for us, which three key aspects should we really remember and act on?

**Jeannie Walters:** Mm hmm. Number one get the foundations right. Figure out who are you to your customers, how do you need to show up? Number two understand their journey from their perspective. Don't use a process map and call it a journey map. And number three, like progress over perfection, we need to make sure that we are taking one step at a time here. It takes time. Be patient and just have that vision to guide you.

**Elisabeth Riemann:** Brilliant. Jeannie, thank you so much for today's fascinating conversation. I've loved it. I'd also like to say thank you to the learners of your course as well who voted in the poll and chose today's fantastic topics. I think they made an excellent choice! It was a tough choice out of all the topics. But great job. And I personally have learned so much. Thank you very, very much.

**Jeannie Walters:** Thank you so much and thank you to the learners, this was a lot of fun to do that course. So let us, let me know what you do with all this information. I'd love to hear from you.

**Elisabeth Riemann:** Absolutely, communication's key.

**Jeannie Walters:** Absolutely. Thank you so much, Lizzie.

**Elisabeth Riemann:** Thanks for listening to openSAP Invites Thought Leaders with Jeannie Walters and thank you to our sound engineer, Miguel Caroli. If you've enjoyed this episode, please share, rate, and leave a review and be sure to check out openSAP's free learning portfolio of Massive Open Online Courses, Microlearnings, and Podcasts on openSAP.com. And don't miss your next invite, subscribe now.

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