

Example case I from Zanna’s own experience (successful)

Challenge

How do I convince the (operations) manager that learning from complaints is valuable?

Context

External pressure
Customer in the center

The contact center manager of this organisation was responsible for complaints management. There was a separate complaints department within his contact center that was lead by a complaints manager. Both managers felt that their complaint management needed to be improved and created budget for this. Partially it gained importance due to an audit and partially because both of them were convinced of the importance of learning from complaints and putting the customer back in the heart of the organisation. Their main challenge was that operational departments did no prioritize improvements based on the top x complaints.

Different priorities
Low impact

For years this complaint had been the number 1: “buying off my life insurance takes very long or doesn’t happen at all”. Customers were very unhappy about this topic, making it a top priority for the complaints manager. The operations manager responsible for this process had different priorities though. He was mainly responsible for more efficiency and for this process his internal SLA’s (time the steps in the process took) were all on green, meaning within the agreed timeframe. Moreover, they received 100 complaints with a customer base of 100.000, so he was not convinced that improving based on complaints would add any value.

Blame game

At the same time, he was always seen as the one’ causing’ the number one complaint, so the atmosphere around complaints was getting more and more difficult.

Approach

Connect prios
Win-win

Our primary goal was to make sure that we could connect the goals and priorities of the complaints department and the operations department. Would it be possible to show that there was significantly more efficiency to be gained by using the customer perspective?

Detailjourney mapping

We decided to do a quick round with all the departments involved to understand what the journey / process looks like from the customer’s perspective. Six departments were involved and the total process time of each department (who were all responsible for a part of the journey) were on green. Meaning their department was within the range of the time agreed upon for their piece of the process.

Prevent silo thinking

After we had mapped this detailed journey, all these steps across the departments together added up to 37 working days. Almost 8 weeks. When a customer was curious about the status of the process and would call the contact center, the employees were answering “it will be processed within 10 working days”.

Simplicity in insights
New perspective

We presented the insights of this journey map in just 1 sheet and shared it with the operations manager. To him, this insight that in total it took almost 8 weeks, was completely new. The indicators per department may have been on green, but they had never checked the total time from the customer perspective when adding all these steps together.

Duration

The total project around complaints management was 6 months, but mapping the journey and convincing the operations manager was just a matter of 2 weeks.

Result

The operations manager was immediately sold on the value of looking at his own processes from the journey perspective. Now it was very clear that there was a lot of efficiency to be gained by shortening the total handling time. As a consequence, the whole energy around complaints changed and there was much more willingness to use the customer perspective as a valuable tool to improve processes and reach the set targets.

Key takeaways

During the development of the diagnostic tool, I will analyse all cases shared, filter out key takeaways and add additional tips and tricks based on the diagnosis.

Example case II from Zanna's own experience (unsuccessful)

Challenge

How do I create more awareness of the customer perspective with sales and account managers?

Context

Customer
in the
center

Inside-out
view

Outside-in
view

In this organisation there was a team of sales and account managers that was responsible for the biggest clients of the organisation, so these guys and girls were top level in their field. The manager of this team felt that, in order to be even more successful, the team members should become aware of focusing on the needs of the customers from a different (outside-in) perspective than they were normally used to do in their daily work. I loved this challenge because I had been talking to other sales directors who wanted their teams to be more customer centric, while I always assumed that account and sales were intrinsically customer centric. And although they are of course, still they tend to take an *inside-out view* (what products and services do I have to offer to the client) instead of completely focusing on the journey and needs of the clients and then translate that back to the best fitting solutions (*outside-in view*). So this was a great first experiment to see how we could energize and inspire them in such a way, that they would feel the tools and tips would help them in their daily work.

Approach

Create
energy

Best self
exercise

Fun and
impact

I designed a workshop with a few exercises for them. Since this was a new start for the team including some new members, first we did an exercise to get to know each other in a different way and create additional energy in the group. Based on the book of Dan Cable *Alive at work*, we ran a so-called best self exercise. We started the workshop by explaining the insights we had gained from all the driver analyses we did, giving us an understanding what really mattered to the clients. With a fun quiz we let them guess what they thought were the most and least important drivers to create happy clients. Based on an interview I had done with one of the account managers to prepare and



Understand
their context

understand their context, I had designed a format for them to fill out during the workshop to think of the AS IS and TO BE journey of their clients. After I had explained the exercise, the groups started to work on it. Soon I realized that the format I had created was too complex and vague. They were struggling how to use it and although they had some valuable discussions between them, I did not achieve what I had in

Intervention

mind. So I intervened in the process and decided to leave the exercise for now and do a follow up after this session.

Duration

From preparation to running the workshop it took around 6 weeks.

Result

The whole group was very energized based on the exercises we did and the insights we shared. But we had not been able to brainstorm about the journey of the clients as we had set out to do. And it didn't completely click for them how they could use this way of looking from the customer's perspective in their own daily work. Three months later we had a second session, where I redesigned part of the workshop and created two simple but very impactful exercises. That time, the exercises really clicked with the team. We achieved our goal of them being much more conscious to focus on the customer journey and drivers (outside-in) and they were energized to use the formats and results from the exercises in their daily work with clients.

Key takeaways

During the development of the diagnostic tool, I will analyse all cases shared, filter out key takeaways and add additional tips and tricks based on the diagnosis.