

# Developing a Customer Focused Culture with Experience Mapping Workshops



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# Gelb

# Developing a Customer Focused Culture with Experience Mapping Workshops

## Introduction

Professionals across every type of service organization face the challenge of developing a culture that delivers high quality customer experiences. Providing exceptional experiences creates brand loyalty and drives profitable growth and advocacy. In fact, customer loyalty is often more about how customers feel about their experience than what they rationally think about products and services.

Our experience mapping technique has been used by nationally-renowned healthcare organizations to develop a better understanding of the experiences they deliver. Understanding customer experiences is an important and necessary first step, but many organizations find it challenging to take the next step of imparting what they have learned to others within the organization and developing a rollout plan for improvement. In the following pages, we will outline prescriptions for using training workshops to motivate employees and define key behaviors. Translating these behaviors is critical for long-term growth.

Consider this conversation we witnessed at a large academic medical center:

“Don’t we already have service standards? Why do you need experience mapping? It seems like we’ve already done this work.”

“Yes, we’ve had service standards for a few years. Honestly, employees rarely refer to them. They don’t know what’s expected. No one knew what they meant until they develop their own behaviors, specific to the Emergency Department. The experience mapping process built more empathy with patients and helped staff to see how what they do every day reinforces the standards. It brought the standards to life.”

## Translating Service Standards

Almost every healthcare organization has a set of high-level service standards. These often include a series of abstract concepts like Privacy or Professionalism. While a good start, this approach alone often fails to gain internal adoption. Employees frequently read and understand the service standards, but do not have the tools to translate them into everyday behaviors. Furthermore, they see the standards as “ivory tower” mandates, and often don’t live by them. These standards often confuse employees who provide excellent service (in their own way), but, unfortunately, the organization fails to provide consistent experiences.

After using research to gain a clear understanding of the current experiences of patients, physicians, and families, training workshops can be useful tools for engaging employees to define the ideal experience and brainstorm ways to solve issues that are not currently ideal. Additionally, employees can take responsibility for delivering an ideal experience by developing personal action plans. The process of having employees play a role in the key behaviors they will exhibit in order to fulfill the high-level standards is key to gaining buy-in and making standards actionable.

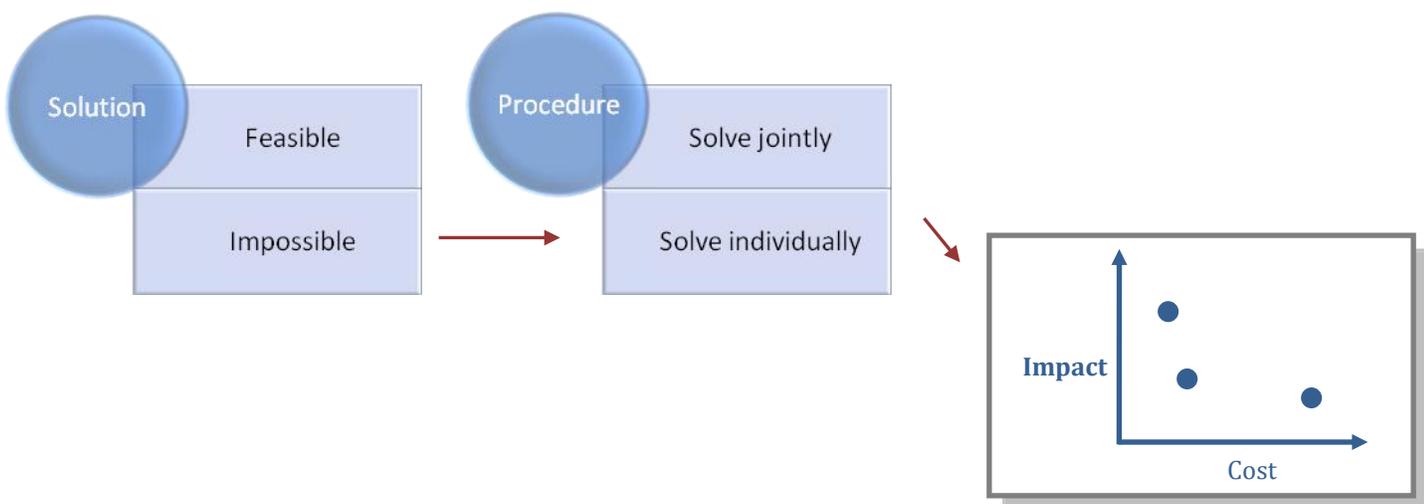
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## Tools to Succeed

When developing workshops, it is necessary to first ensure that attendees have adequate knowledge of current service standards. For this reason, content should include an introduction of your organization’s guidelines for customer experiences (in other words, what you promise to customers) and current strengths and challenges (information that should be derived from research such as experience mapping). This can often be found through service excellence groups or even in your Brand Book. Content should review all of the steps in the customer’s journey, so attendees gain an understanding that even if they only interact with customers at a specific stage in their journey, these interactions shape how customers feel about the rest of their journey. Most often overlooked are expectations the customer has even before they arrive at your facility – based on the promise of your brand.

Motivating employees to consistently follow service standards is crucial. One way to do this is providing them with opportunities to develop empathy throughout the workshop. For example, facilitating discussions about their personal experiences as a customer and how they felt or reacted when their needs were unmet or exceeded. Employees should be given opportunities to think from the patient’s perspective by answering questions such as “If you or a family member were a patient, what would be your ideal experience?” Additionally, providing them with patient quotes, videos or stories gives them an opportunity to hear how their individual actions and decisions impact customers. For example, our team often uses short audio clips from patient interviews to reinforce need areas; these evoke strong reactions from those listening to the presentation because they are able to hear emotions in the patients’ voices that are impossible to capture on paper.

Finally, employees need to be empowered to demonstrate behaviors or make changes that are necessary to meet customer needs. When possible, workshops should include an opportunity for attendees to brainstorm solutions to issues that prohibit an ideal experience. Many workshops do not initially allow enough time to critique ideas and confirm solutions, so it is important to set clear expectations for this at the beginning. One method that works for many organizations is to prioritize need areas based on feasibility, then cost/benefit tradeoffs.



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Assign a determined need area to a work team composed of employees who have positions or experience related to the need area. Teams should be given specific instructions to structure their brainstorming. For example, they could be given a list of specific problems within the need area that they have been assigned, and then asked to develop ideas on Post-It-Notes. The Post-It Notes are then clustered into categories based on similarity, and the group discusses who should have the primary responsibility for managing the issue (such as marketing, information systems or service improvement teams) and what resources are necessary to enact the solution.

Another way to structure brainstorming is to provide teams with concepts that build an ideal experience, and then instruct them to develop recommendations for improving each of those concept areas. We have found that experience-related need areas can often be categorized into the concepts of communication, care and coordination. For example, when we worked with a large academic medical center to improve the services they provide to out-of-state patients, workshop attendees used the results of our experience mapping research to determine that they wanted to better communicate what they offer via the website and patient handbooks, develop a plan for remotely managing care after patients return home, and coordinate appointments with multiple service areas prior to the patient's visit. Teams will likely develop multiple recommendations under each concept, which they can subsequently prioritize and determine action items for the top priority areas.

Another way to empower and motivate employees during training workshops is to have them create a personal action plan for enhancing customer experiences. When developing their plans, they should be thinking about the question, "What specific things will I do to keep customers satisfied?" Their personal action plan should include resolutions that are relevant to their position or department and can be completed individually or within their work group. After the training, supervisors and workgroups should reference personal action plans to review successes and set goals for continued improvement. Setting up a plan to continue using and monitoring the personal action plans after the training workshops is very important, as this will help employees transfer what they learned to everyday situations.

### Case Study



Winning the fight against cancer, every day.®

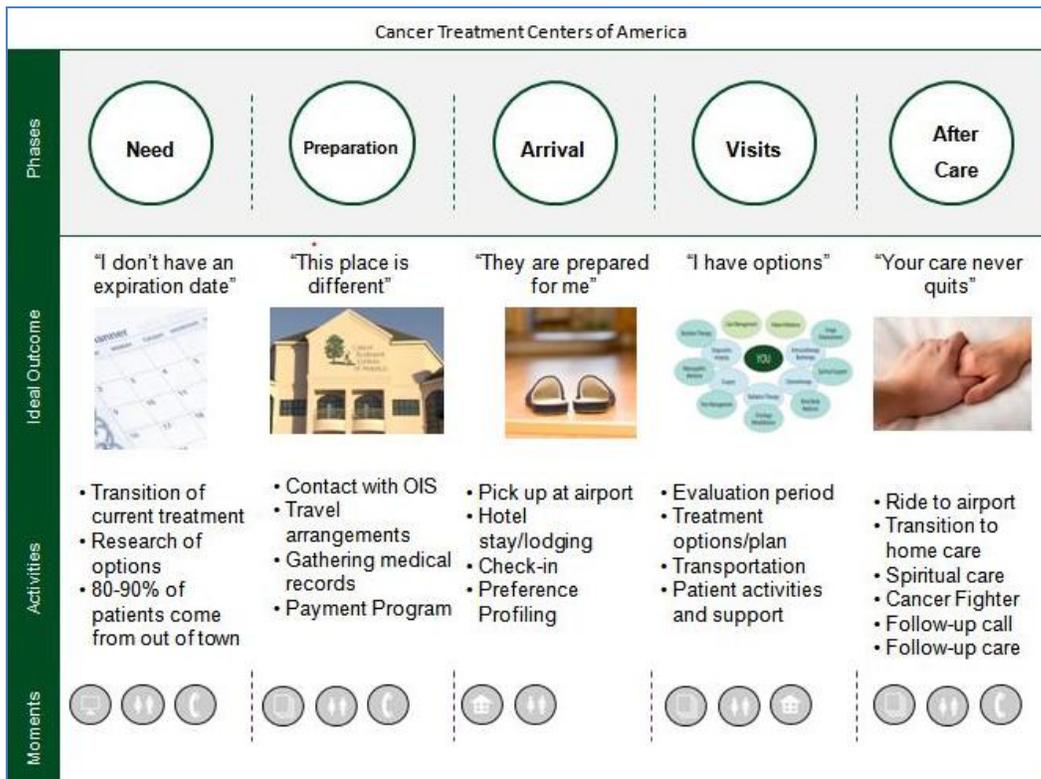
Cancer Treatment Centers America® (CTCA) is a multi-site healthcare provider that partnered with Gelb to create a guest (how they refer to patients and their families) experience training that would be relevant to stakeholders (how they refer to employees) across their organization.

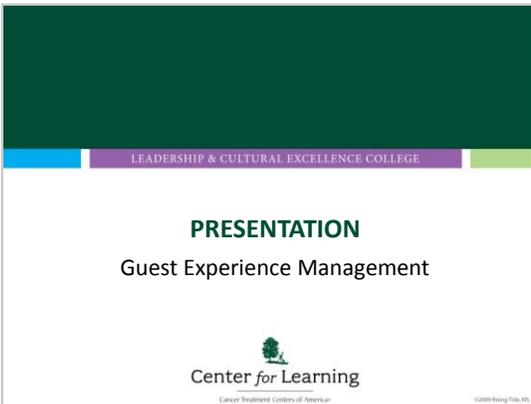
Although they had overall high patient satisfaction scores at the beginning of the process, they noticed some specific areas of the guest journey that were consistently rated lower in satisfaction than others. Through this training, they wanted to improve these specific areas and solidify their already high-performing areas to reinforce their culture of Mother Standard® of care (their foundational approach that asks "If your mother had cancer, how would you want her to be treated?") by providing tools that made the current guidelines more tangible.

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We began by meeting with stakeholders in multiple customer service roles and reviewing current educational materials, research, patient satisfaction scores, and website content. After gaining a clear understanding of their current service standards and how they were being enacted in everyday situations, we worked with their team to develop rich content that included an introduction to experience management, aligning their philosophy with each step of the guest journey, and personal action planning.

The training included patient and stakeholder videos, brainstorming sessions and discussion activities. These day-long workshops affirmed Mother Standard®, divided a guest's journey into specific steps and touchpoints, and provided a basis for developing expected behaviors across all areas. Managers were also providing facilitator training to carry on the work into the future. Below is the experience map that was used to outline the ideal patient journey and an example of a stakeholder video.





OIS' Point of View

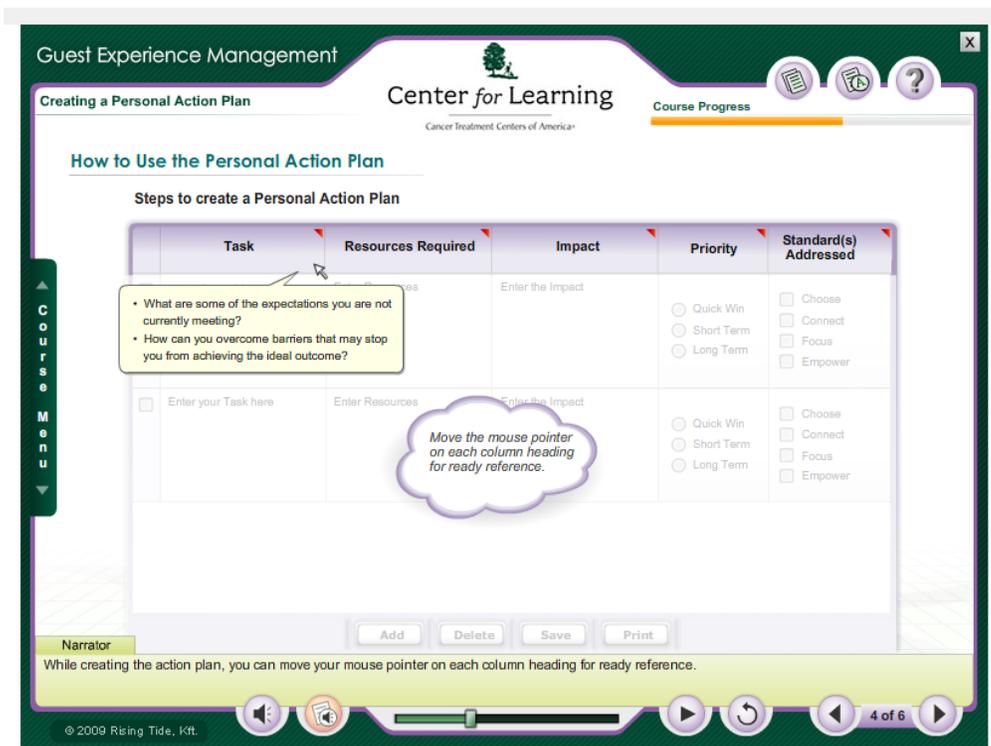
"None of us have an expiration date...I love talking to patients and telling them that there is hope"



Click picture to play video

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Managers use the personal action plans that stakeholders develop after training using an online reinforcement tool to ensure they understand, translate and act upon the expected behaviors. Their personal action plan (see image below) highlights their specific performance against individual goals in order to improve the overall guest experience and for annual recognition and rewards for exceptional stakeholder service. In addition, training and development resource needs can be identified for further reinforcement or skills enhancement.



This was the first learning module offered by their newly formed CTCA Center for Learning. Since the Guest Experience Management training has been in place, there have been favorable changes in the CTCA guest experience. A review of the FY 2010 Patient (guest) Loyalty Survey results reflect significant improvements in three of four hospitals in the following areas: ease and speed of guest admissions, timeliness and ease in which care was delivered and overall satisfaction with medical providers and the CTCA experience, to name a few. Moreover, all four CTCA hospitals showed an increase in guest satisfaction scores related to satisfaction with their hospitalist, radiation oncologist, surgeon, understanding their medical condition and overall change in hopefulness from before to after coming to CTCA.

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## About Gelb

Feeling pressure to increase volume and grow revenues? Gelb Consulting Group, Inc. is a strategic marketing firm that merges analysis, strategy and technology to help clients build and sustain revenue growth.

Gelb is here to help you understand the complexities of your market to develop and implement the right strategies. We use advanced research techniques to understand your market, strategic decision frameworks to determine the best deployment of your resources, and technology to monitor your successes.

For over 40 years, we have worked with marketing leaders on:

- Strategic Marketing
- Brand Building
- Customer Experience Management
- Go to Market
- Product Innovation
- Trademark/Trade Dress Protection