

INDUSTRY INSIGHTS FROM DIGITAL CUSTOMER EXPERIENCE LEADERS 2015

QUESTION 1:

How are you currently using Customer Journey Mapping to interact with your customers?

QUESTION 2:

How do you approach Omni channel in your organization?

QUESTION 3:

How do you go about adopting a mobile first strategy?

QUESTION 4:

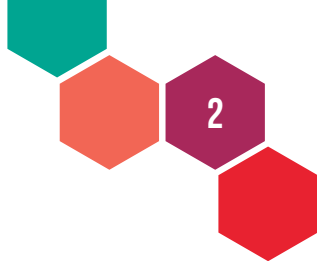
How do you choose which digital channels to invest in?





2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com



QUESTION 1.

How are you currently using Customer Journey Mapping to interact with your customers?



INGRID C. LINDBERG

Former Chief Customer Experience Officer

PRIME THERAPEUTICS

Stevie Awards - Maverick of the Year & Best New Product or Service of the Year

I'm a really big fan of something I call the Future State Architecture Map (TM pending). It is a tool that I started using back in 2005/2006 to define what the future should look like. I build it by working with customers and listening to not only their requests and requirements, but for their unstated needs. The things that they don't know that they need in order to make them more loyal to your company. That roadmap is something I've used in many companies since, and it becomes the backbone of a company's business strategy. Once I have that future roadmap, then I work on individual journey maps for the spots where I know we need to focus.



MICHELLE MORRIS FREET

Associate Director, Client Experience

CROWE HORWATH LLP

We have worked with our clients to create a journey map in a key segment of the business where we noticed the client engagement scores were lower than the rest of the firm's scores. When digging deeper and understanding the client's feedback we have learned several key findings that help us to see from our client's eyes where we excel and where we need to interact with them differently. Modifying our behavior to better align with the clients expectations has resulted in nearly a 40% increase in the engagement scores, in this segment alone!



2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com



QUESTION 1.

How are you currently using Customer Journey Mapping to interact with your customers?



RICK MEDEIROS

Executive Director, Lenovo.com Global Usability & Customer Experience

LENOVO

We have mapped the entire online journey down to the individual interactions that visitors and customers have with the brand as well as functionality on the site across awareness, research, purchase, post purchase, support and social.



TIM HASSED

Director, Digital Customer Experience

TELUS

We've used customer journey mapping as a guide of where to focus our efforts to reduce pain points as well as identify opportunities between different channels to help create the bridges for customers. We also use journey mapping to help with digital adoption – identifying for other channels the moments of truth where they can drive the customer online. This could be for on boarding, troubleshooting, account management, bill payment etc.



KAREN KERLEY

Director, Client Experience,

TRADEKING

Since our beginning, we've been focused on our mantra: "Be good." That means striving to provide excellent service, understanding our clients' needs, and doing our best to create a great product every day. The last 12 months have brought a more vigorous commitment of time and talent to understanding our clients through more rigorous user research, journey mapping, and even persona development. The net-net is we're shifting to an even more client-centric focus, and that's impacting everything we do - from the copy we craft to the products we design.



QUESTION 1.

How are you currently using Customer Journey Mapping to interact with your customers?



CAROL BUEHRENS

Customer Experience Strategist

ICW GROUP

- Customer Journey Maps help us clearly visualize the experiences our customers have with our organization. By understanding the interactions our customers are facing, and drawing it out on a map, maps help us to clarify touchpoints that are critical to the success of our customers, diagram issues so that they are clearly understood, identify gaps in our services, eliminate distractions and roadblocks, and create unified, value-added experiences.
- As strategic and innovation tools, we use Customer Journey Maps to help design new experiences to enhance customer engagement and provide additional benefits.
- Maps help us break down the silo walls, allowing teams across our company to engage in genuine conversations about what we can do, together, to help our customers be successful.
- We've tied emotional mapping to Journey Maps, and have developed storyboards. By illustrating our customer's reactions and emotions, our internal teams can better empathize with our customers and connect with them on a more passionate level.
- Using customer ecosystem mapping, which ties the Customer Journey Map to our own internal processes, we can quickly identify streamlining opportunities that benefit both our customers and ourselves.
- Colorful Journey Maps images also serve as interfaces on our intranet, allowing team members to point-and-click on the touchpoint their customer is in, providing access to relevant relationship tools and communication messages.



2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com



QUESTION 2.

How do you approach Omni-channel in your organization?



INGRID C. LINDBERG

Former Chief Customer Experience Officer

PRIME THERAPEUTICS

Stevie Awards - Maverick of the Year & Best New Product or Service of the Year

Omni-channel is a fascinating issue for many companies. So many of the firms that I work with have multiple leaders over multiple channels and then overlaid with multiple leaders of different P&Ls, products, whatever! It just becomes noise. I always recommend bringing all the channels under one leader, and if you can't do that, at least bring the accountability for what message is the priority under one leader. Once you control the message, you can start to create the consistency that consumers crave.



MICHELLE MORRIS FREET

Associate Director, Client Experience

CROWE HORWATH LLP

As younger executives ascend into the organization, we are aware of the shift in media needs. Executives are more comfortable with mobile and other devices and want to consume information through whichever channel they want. In order to assess where our buyers spend their time, we are measuring the usage in each Omni-channel, which is challenging. In our B2B space, 75% of a buyer's journey happens before talking to a salesperson. And we know that the expectations are high across all channels. Our strategy of how to approach Omni-channel in the sales space relies on an accurate assessment of the usage. Another strong consideration as financial consultants, is to maintain the security of our client's information and assets. We take this very seriously at Crowe Horwath, and it is at the forefront of all of our decision making.



2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com



QUESTION 2.

How do you approach Omnichannel in your organization?



RICK MEDEIROS

Executive Director, Lenovo.com Global Usability & Customer Experience

LENOVO

This is still a relatively growing area for any enterprise, but Lenovo first dipped its toes into Omnichannel 3 years ago with implementing a globally scalable responsive web design for mobile users. We then moved into areas of content targeting to ensure customers were targeted with the right messages and promotions. We utilize UGC for specific campaigns to help reinforce and build buzz, but more importantly engagement with current customers and “new to Lenovo” visitors. Lastly, we are testing different methods for linking retail/etail where if a customer decides to buy at a POS other than Lenovo.com we reach out and try to match the right peripherals and services to enhance their experience using Lenovo products.



GINA COLLINS

Chief Marketing Officer

BUILD-A-BEAR WORKSHOP

For us, it’s about connecting and engaging with fans in a meaningful way. We know that the customer experience in one channel isn’t the same in another. Each channel has its own strengths and we strive to offer the best experience on each by creating specific content for platforms.



2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com



QUESTION 2.

How do you approach Omni-channel in your organization?



TIM HASSED

Director, Digital Customer Experience

TELUS

Identifying omni channel opportunities has sprung from the journey mapping exercises. Once we mapped the cross channel customer journey we could clearly see where the opportunities were to start more tightly connecting the channels. An example is for device renewal. We know customers research online but often want to physically compare devices so we're enabling customers do complete their research online and save that into an appointment booking engine that books them an in store appointment to see the devices and confirm their options with a sales rep.



KAREN KERLEY

Director, Client Experience,

TRADEKING

Simple. We use good, old-fashioned communication principles: know our goal, know the audience, know the channels they use, know the channels available to us, craft a consistent and contiguous experience across as many of those channels as we can. Have we nailed it yet? No, but with every campaign, we learn more, and we get better at it.



QUESTION 2.

How do you approach Omni-channel in your organization?



CAROL BUEHRENS

Customer Experience Strategist

ICW GROUP

- One of our 4 corporate goals is to deliver exceptional, end-to-end customer experiences. To deliver on this goal, we work diligently to ensure that our customers receive seamless and consistent experiences across multiple touchpoints. This means consistent brand messages, values and services throughout multiple channels and devices.
- Many large organizations tend to operate in silos, which can negatively impact channel delivery. The result can be in a variety of different experiences, messages, and values through channels that act independently of one another as each facet of the business supplies what they feel is the right offering for “their” customers. We’re becoming very accomplished at breaking down these walls and getting everyone on the same page, innovating on behalf of “our” customers, together.
- Journey Mapping has been an essential tool for this because you can quickly visualize the impact dissimilar offerings have on customers. We’ve found that holding Journey Map workshops with all of the associated stakeholders helps us unite and work together to meet our unified goal.



2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com



QUESTION 3.

How do you go about adopting a mobile first strategy?



INGRID C. LINDBERG

Former Chief Customer Experience Officer

PRIME THERAPEUTICS

Stevie Awards - Maverick of the Year & Best New Product or Service of the Year

I was recently at a firm where we needed to do a complete overhaul of our digital properties. It was a no brainer for us to build on a mobile enabled platform. What I've found interesting as I work across industries is that not everyone does everything on their mobile. So many people do their "home-work" from their laptops in the office, or over Saturday morning coffee at their old desktop! It is amazing when you actually take the time to not only see, but to watch how your customers interface with your company. The key is not to build mobile at the expense of the other channels.



MICHELLE MORRIS FREET

Associate Director, Client Experience

CROWE HORWATH LLP

We have not seen a big push in our industry towards mobile, yet. So we haven't had to confront it as urgently as other companies. But we have had a strategic team designing the mobile strategy for Crowe to deliver to our clients. One area where we can better serve our clients is through providing quick and easy access of information to our partners and relationship managers enabling them to have the knowledge of the firm at their fingertips.



QUESTION 3.

How do you go about adopting a mobile first strategy?



RICK MEDEIROS

Executive Director, Lenovo.com Global Usability & Customer Experience

LENOVO

We were the first in the PC industry and maybe a leader compared to other major brands of fully implementing a Responsive Web Design. We decided that a 3rd party mobile platform was cost prohibitive for the 160 countries we serve and that RWD was going to relay the brand attitude and design much more appropriately. As we launched RWD it was not smooth sailing. We needed to transform the mindset internally to thinking not only about desktop designs and user experiences but to think of all screens in our usability. Now, mobile is equally thought of in all things we do even from a reach and campaign standpoint.



GINA COLLINS

Chief Marketing Officer

BUILD-A-BEAR WORKSHOP

Mobile has created an interesting dynamic where fans are connecting in real time, so our focus is on allowing consumers to engage with the brand wherever and whenever they want. We also look at mobile as an extension of the brand and have created apps to accompany some of our products to extend play. For example, our new Promise Pets line has an accompanying app that helps kids learn about responsible pet ownership in an engaging way.



2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com



QUESTION 3.

How do you go about adopting a mobile first strategy?



TIM HASSED

Director, Digital Customer Experience

TELUS

We rebuilt our site 2.5 years ago and one of the guiding principles was mobile first. Everything we thought about, from content to functionality, was designed to work on mobile. This had a fantastic effect of driving simplicity in the experience and eliminating unnecessary content. Our growth in mobile traffic has increased five fold.

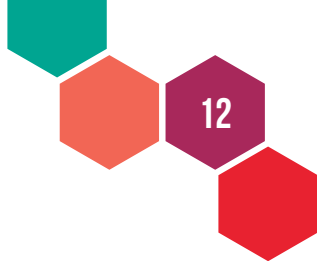


KAREN KERLEY

Director, Client Experience,

TRADEKING

Our newest trading site, TradeKing LIVE, is responsive. And, our goal is to create one site and one experience across all devices. That's a first for us – particularly as a data-heavy trading platform. We tackled early responsive designs by first designing for desktop and then translating that design to mobile. Because market data is extremely important to many of our active traders, we've had to maintain a laser-sharp focus on desktop interfaces. So, right now our approach is still lead with desktop and scale down to mobile. We've really just started our journey towards mobile-first design.



QUESTION 3.

How do you go about adopting a mobile first strategy?



CAROL BUEHRENS

Customer Experience Strategist

ICW GROUP

- The way we approached it was that we educated ourselves in this area several years ago, in preparation to convert our largest corporate website. We needed to understand the mobile lifestyle of our customers and what they wanted to access on our sites from their mobile devices. We decided on responsive technology, where a single site responds and adapts to the various sized screens. Then, we hired the right individuals to help us deliver the concept. We designed the mobile phone offering and then continued to the designs for tablets and then to the larger screens.
- From our experience, we found that before we could employ a mobile first strategy, we had to first have everyone agree to adopt an attitude of de-cluttering. This can be a political nightmare, as everyone wants their information on the front page. Once you've arrived at this streamlined offering for mobile, it's much easier to adapt the site to the various sizes.
- Presently, we're converting all of our sites into responsive technology, designing the mobile offering first. We are also reexamining our customer's mobile lifestyle, since it has progressed so quickly over the last few years. Access of our sites through mobile has increased by approximately 30%.



QUESTION 4.

How do you choose which digital channels to invest in?



INGRID C. LINDBERG

Former Chief Customer Experience Officer

PRIME THERAPEUTICS

Stevie Awards - Maverick of the Year & Best New Product or Service of the Year

There is so much talk of “meeting people where they are” these days. I feel like that statement is a bit early 00s. I think that the reality is that we now live in a world where consumers expect to be able to move seamlessly across any and all channels. I’m finding that so many companies are putting so much investment into mobile that they are letting their contact centers slip, or their websites if they are all focused on apps. I think the key is that you have to be balanced. You can’t swing the pendulum so far over to one channel that you lose the others.



MICHELLE MORRIS FREET

Associate Director, Client Experience

CROWE HORWATH LLP

Where to invest is never an easy decision. Most of what we do in marketing is really making sure that when our clients or prospects have a need we can fill, they know we can fill it. To do this, the old school “batch and blast” mentality of targeting ever larger groups of individuals in the hopes that this strategy would drive revenue is increasingly being abandoned. Our recent refreshed vision for the firm focuses on “deep specialization” especially within our vertical industry and technical expertise focus areas. Our best strategy for digital or other marketing efforts is to find the key buyers that align with our deep specialization and target them where they consume information. For example, we utilize LinkedIn groups to help us find our target audience. Although not fool proof, we can utilize metrics to understand if our targeted messages are at least getting to this audience, if they read them, and the final step - did they take our call to action....



QUESTION 4.

How do you choose which digital channels to invest in?



GINA COLLINS

Chief Marketing Officer

BUILD-A-BEAR WORKSHOP

We're listening to our customers and evolving our brand to be more digital savvy. Our millennial consumers grew up in a tech world and expect a lot from us, which is why we're investing in digital to provide a consistent and fun experience in and out of our stores. We rebuilt our website last year to accommodate gaming, playing, storytelling and shopping to create a better experience for consumers across all devices. We saw significant metrics improvements and mobile engagement was up more than 200 percent from the previous year.



TIM HASSED

Director, Digital Customer Experience

TELUS

Our primary digital channels are the site and the app. The efforts on the site are around research, sales, support and self serve. For the App it's self serve account management. In terms of where to focus, this is based on both customer and business value. Providing ease of use and 24x7 availability to customers while driving costs out of the business is good for all.

QUESTION 4.

How do you choose which digital channels to invest in?



KAREN KERLEY

Director, Client Experience,
TRADEKING

Where we see an opportunity, we look at the data - and we test. If a new channel tests well, we'll begin infusing more resources into that channel. Particularly for marketing channels, it's really all about performance.



CAROL BUEHRENS

Customer Experience Strategist
ICW GROUP

- What matters most is the experience we provide our customers, regardless of the channel. We're not trying to implement a new technology because it's the latest thing - we need to provide the correct offering to our customers to help them be successful.
- We look to our customers to understand what they need and how they need it delivered to fit their lifestyle. We want it to be as easy as possible to do business with us. This could mean providing the tools they need via their phone when in the field, or by providing online assistance for completing an insurance application.
- Making all of our provided channels "personal and interconnected," so that we can continue to improve our relationships and customers can channel-hop as needed, has become a top priority for us.

2ND ANNUAL DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23 - 24, 2015 • Chicago Hyatt Regency McCormick Place • www.digitalcustomerexp.com

16

SECOND ANNUAL
DIGITAL CUSTOMER EXPERIENCE STRATEGIES SUMMIT

September 23rd - 24th, 2015 | Chicago | Hyatt Regency McCormick Place

Success stories on mobile, social, and personalization from leading brands to help you transform your CX

Award-Winning Case Studies & Speakers

World-renowned thought leaders:

- Erica Javellana, Speaker of The House, Zappos
- Don Fertman, Chief Development Officer, Franchise World Headquarters/SUBWAY
- Tim Hassed, Director, Digital Customer Experience, TELUS
- Rick Medeiros, Executive Director, Lenovo.com Global Usability & Customer Experience, Lenovo
- Frederick Crosby, VP, Western Union Digital - Business Development & Marketing, Western Union

Exclusive Insights on:

- Social & Mobile
- Customer-centric Culture
- Omni-Channel
- Engagement & Loyalty
- Personalization
- Emerging Channels
- Metrics & Analytics

3 In-depth Workshops:

- Customer Experience Journey Mapping
- Journeying into the Consciousness of the Customers
- Social Media Analytics and Customer Experience

Gold Sponsor: Maritz CX, IBM, CRM Exchange, CMS WIRE, QUIRKS, CXPA, Forrester, ClearAction

Partners: Zappos Insights, SUBWAY, TELUS, Lenovo.com, Western Union

Register Today at: www.digitalcustomerexp.com

LEARN MORE FROM THESE SPEAKERS

You can hear more on what these speakers and many others have to say at our **2nd Annual Digital Customer Experience Strategies Summit**. It's being held on **September 23rd & 24th 2015** at the **Hyatt Regency McCormick Place** in Chicago.

EXCLUSIVE INSIGHTS ON:

- Social & Mobile
- Customer-centric Culture
- Omni-Channel
- Engagement & Loyalty
- Personalization
- Emerging Channels
- Metrics & Analytics

[View The Event Brochure](#)