WHAT IS A CUSTOMER EXPERIENCE INTEGRATOR (CXI)?

By

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A MORE POWERFUL
END-TO-END CX SOLUTION

HFI-CXI is unique because the differentiated experience of the user finally gets delivered. We start with a deep understanding of the user's ecosystem, mental model, drives, and blocks, then we build a user-centered strategy around that understanding. We deliver everything needed including technology, hosting, maintenance, and metrics and at the heart of all this is HFI's human factors design science.

The experience might be a whole ecosystem of facilities (service design) that make up the touchpoints of a bank or it might be just a website that does customer acquisition. The result is fully focused on customer needs, limitations, and drivers of engagement.

Human Factors International, Inc. might be the first Customer Experience Integrator (HFI-CXI). And I think it is about time. We now have decades of 'Systems Integrators' delivering solutions. So how is a CXI different and why is it important?

Failing Fast and Now Failing for a Decade

In 2012 Forrester reported that 97% of companies had customer experience quality as a strategic imperative. But just now Avaya published that 81% of organizations have seen their Customer Experience Management (CXM) initiatives fail. We have had thousands of digital transformations. We have had companies and Systems Integrators delivering uncountable solutions. Yet, we can see that customer experience is only very gradually improving. And it is often getting worse. What is happening??? I think there is a transformation in approach needed for success.

SO WHY DO WE SEE SO MUCH FAILURE?

Basically, the whole business world has been pushing to create great customer experience solutions, and the results have been a bit discouraging. There are brilliant minds, and tons of money deployed. So, what is holding us back?

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Growing CX Leaders

The good news is that there is a growing cohort of executives that understand that CX work is a hard engineering job, and they are getting smart about how to build or buy an effective UX practice. As this group grows we will see reliable success.

Snake Oil

There have been some companies selling nonsense. Are they unethical? I think so. About a decade ago I started seeing many companies poaching staff from our Indian office. They were putting them into their PRE-SALES groups because they had learned how to talk about good CX design. And they had them pitch CX even when these organizations had almost no capability to deliver.

There has been an ongoing onslaught of slick marketing of solutions to CX design which are new, and easy, and radical, and don't work. There is also a whole ecosystem of people explaining how to get jobs in the field based on a 12-minute YouTube video.

But there is definitely a major wave of executives that get it. I recently was advising the board of a huge Pharmaceutical company. They were laughing because one of the major systems-oriented companies had given them a 400-page proposal to do their CX work, but they all knew they couldn't deliver. And many job postings are now asking for HFI's CUA™ certification. So, we are solidly getting past the snake oil phase (no AI does not solve UX… sigh).

How to land a career in UX design with zero qualifications

Gloria Lo [Follow]

Nov 19 · 10 min read

In the past three months, I've had a few people ask me about how I landed a job in UX design without having any relevant experience under my belt.

"How did you get into UX without a design degree?"

"What did you do to learn how to become a UX designer?"

Waiting Until You Die Might Not Be Needed

My friends at the Neilson-Norman Group have a UX maturity model that goes back 20 years. They are quite right that the field is complicated and that it requires a different approach.

But I've seen managers get it, and I've helped support, and even built, operated, and transferred whole large scale CX design groups. I'm even working now on the first sovereign CX program. By royal decree, one middle eastern country wants all 190 ministries to have good CX design capabilities. So, I think we need not wait a generation for success.

The Transition from a Systems Integrator to a CXI

Every systems integrator and every large-scale agency is now working to solve the CX design problem. They are huge, powerful, and determined but sometimes they make the wrong moves. They are buying boutique UX companies. This is like wanting to build a hospital and doing it by buying a small dermatology clinic and putting it into a warehouse. And when buying companies, they are known to buy a visual design operation instead of a CX engineering shop. Sometimes with great determination they decide to hire a mass of CX practitioners, which is like building a hospital by hiring 1,000 surgeons. Unfortunately, that alone will not succeed but they will figure that out and someday all convert to CXIs, I hope.

HOW IS A CXI DIFFERENT?

Good CX engineering is done through the looking glass. When I started working a AT&T the systems folks talked about 'I/O' constantly. And I got it wrong. Because for me, the inputs were what went into the user's eyes. To do human-centered design, everything is backwards. If you call a Systems Integrator they still tend to think first about the technology stack or a set of functions or a business model. Today that does not really differentiate a company, everyone is doing that.

A TECHNOLOGY CENTERED STRATEGY
LOOKS LIKE THIS

Notice how the focus is on the technological programs. It does not start with the user's needs.

Initiatives

Improved Customer Experience

1. Traffic Optimization ✅

2. Service Excellence ✅

3. Retention Management ✅

4. Reach Enhancement ✅

5. B2B Enablement ✅

6. Enterprise Architecture Best practice ✅

7. Operational Effectiveness ✅

A CXI naturally starts by thinking about the customer ecosystem. They think about what will make the customer's relationship with the bank different. That difference can't be a function or an offer because those are trivial to copy. It needs to be something deeper in the relationship. And then the CXI works out how to deliver that experience, integrating all the parts to create a seamless whole.

A CUSTOMER-CENTERED STRATEGY
LOOKS LIKE THIS

The CXI starts by doing research to understand the user's needs and feelings. Then they plan how to make the user's relationship with the bank special. Only with this in place can you build a set of channels (touchpoints) that fit together in a seamless and comprehensible way.

CORE PERSUASION STRUCTURE

Relationship Theme

Fear

High Net Worth Investor

Financial mistakes can be catastrophic

Risk

Individuation

I am special (and important) and have unique investment needs

"We Understand What Drives You"

Investment solutions must be based on your needs, both explained and unexplained.

Social Learning

Social Validation

Power of People we Like

OMNI CHANNEL STRUCTURE

User Profiles
Middle Market
3rd level customers

SB SA-U2M

UX Enterprise™ Stamp

Digital or Branch Research – Origination - Service

Bank Branch
Branch for paper

Migrate Here

Quick Question. Where to go…

Call Center Rep
Answers from IVR

Updates Arrive from Email or SMS

Native Mobile Pre-Approval Wallet

Updates Arrive from

Debt Planner

The CXI starts with the customer. It does not design the customer experience by putting lipstick on a pig. There is a whole process and a whole set of capabilities that go with making this successful.

REQUIREMENTS
FOR A **SUCCESSFUL CXI**

Leadership

As head of HFI-CXI I look at the world in a highly customer-centric way. I have a PhD and 42 years of work in the CX field. I know how to practically design customer experiences that work and I have a core team of 1,600 staff plus partners to ensure that it gets done right. The DNA of HFI is human-centered design and it starts with me. But, the CX leaders of the future need not be PhDs in CX. I would much rather see a good leader that understands how to push CX ahead, rather than a CX designer who is skilled but can't lead.

Most System Integrators have leadership that comes from a systems background. Or business management. Or sales. And their focus trickles down the organization. I've been in meetings with executives of System Integrators where they told me they were happy to have C-Minus level customer centricity. They feel like this is good enough to keep working with their clients. I'm happy to see much of that thinking melting away as leadership gets more sophisticated about customer-centric design. Those leaders are coming to the customer-centered viewpoint. The survival of their clients is now based on making customer experience a differentiator. Working with C-Minus customer centricity is no longer enough.

Process

I was working with a bank in South Africa and they brought in a large marketing firm from London that offered to help them in their digital transformation. They promised to do extensive customer journey mapping and interviews. Their presentation was impressive and against my recommendations the bank spent millions and two years. At the end I met the bank's project lead and she looked haggard and distraught. She looked twenty years older. They found themselves with a ton of customer journey maps with thousands of customer value propositions. But, as predicted, they could not even say what the new banking home pages would look like. 'Customer Journey Mapping' is a newly named old method of tactical improvement (called 'Performance Analysis'). It is mostly attractive because folks can learn how to do it in a day. But it does not build systems.

The good news is that the CX field started long before I was born in 1942. The methods are quite well understood. But if you apply the wrong methods things fail. Sometimes they fail fast, and sometimes slow. But the results are predictable. Getting the project planning done right is key. Remember that well begun is half done. I think you want to succeed fast.

Not Just Pretty and Not Just Usable

Everyone knows that putting a visual design team against a complex interface design makes a beautiful but unusable solution. It is bad because customers are not online to look at your pretty graphics. There is good data that says that a quality visual treatment increases trust. But there is far more going on. Look at great sites like Facebook, Amazon, YouTube, and Fidelity. They are wildly successful. But their graphics are boring.

In fact, even making things easy to use does not ensure engagement. Today usability is 'table stakes'. If you have a confusing set of touchpoints you might as well shut shop. You can't have a competitive business that tortures customers with technology. Ten years ago, I shot a video and said "Usability is No Longer Enough" (https://www.youtube.com/watch?v=_MLJyVPMuYA) and I did it because there is a whole area of design for emotion and persuasion engineering that has finally become the real competitive differentiator. There are a ton of tools we use to engage, convert, and retain customers. And they are all beyond just making things simple and easy. A CXI must handle usability, visual design, and persuasion.

JOB AID FROM HFI'S BASIC CLASS ON PERSUASION, EMOTION, AND TRUST (PET)

Job Aid of PET Tools   Version 3.0

TRUST

Reputation
- Domain Name
- Famous People
- Common People
- Certifications
- Awards
- Testimonials
- Peer Advice
- Customer Service Comments
- Credible Organizations

Good Design
- Design Quality
- Match Existing Design Knowledge
- FAQ
- Links

Fine Print
- Citations
- Extensive Content
- Archives
- Physical Address
- Policies that Show Trust

Tone
- Argue Against Self-Interest
- Avoid a "Smarmy" Tone
- Avoid Pushy Sales Language
- Avoid "Too Good to Be True"
- Use Subtlety

EMOTION

Utility, Practicality and Drive Fulfillment Arousal

Norman's Model of Emotional Design
- Visceral
- Behavioral
- Reflective

Intrinsic Motivation
- Optimal Level of Stimulation
- Optimal Level of Dissonance
- Optimal Level of Challenge
- Goal Setting and Knowledge of Results

PERSUASION

Common "Persuasion"
- Facts: Comparisons, Tunneling and Repetition
- Experience: Feedback and Simulation
- Pay: Rewards and Discounts (Side Effects)

Impression
- Contrast Principle
- Decoy Strategy
- Decidophobia (Paradox of Choice)
- High Price Equals Good
- Power of FREE
- Social Proof
- Social Learning

PERSUASION (cont'd)
- The Power of People We Like
- Diffusion of Responsibility
- Scarcity
- Reason for Request
- Over categorization and Correlation
- Overestimation of Big Unlikely Events
- Divestiture Aversion (Fear of Loss)
- Feel Good Principal (History Revision)
- Priming
- Framing
- Conditioning and Association

Validation after Experience
- Scarcity
- Expectation
- Placebo Effect
- Cognitive Dissonance

Pressure Compliance
- Computer as Social Actor
- Reciprocity
- Pressure by People We Like
- Obedience to Authority
- Psychological Reactance
- Momentum of "Yes"
- Compliance Laddering
- Commitment and Creating Fanatics

NAVIGATION
- PET Sort and Discovery Optimization
- Seducible Moment

87

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Staffing

Last week we refused a new client. One British legal firm had given a staff member our two-week course, and she passed our certification test. They then allocated this sole new practitioner for one day each fortnight to do all UX work. And they felt that ten days of CX consulting would do for us to design their client portal. This sort of fanciful staffing is common.

About 18 years ago we said that you need to allocate 10% of your development budget and headcount for customer centered design work. Today, people usually recommend CX staffing levels in the 8-12% range. But we find that changing.

Today the systems coding is much more efficient. There are tools and reusable modules for nearly everything and we have most of that work done in India where the costs are much less. We are working on one right now to create the communities sites for a large bank. We have a selection of social networking sites at hand, and even an AI engine we can tweak to recommend the content for individual customers. The design work is tricky, but the implementation will be swift. So, it is not uncommon for the user-centered work to take 30-70% of our project bids today.

It is also NOT the case that there is just one type of user-centric staff. A large practice might need a PMO, interface experts, specialized researchers, cross cultural designers, and even accessibility specialists. And if you need less than a dozen people it is nearly impossible to sustain that practice and you are better off outsourcing to a CX Integrator.

Knowledge Management

I was working with a British Telco and was delighted that they had 7 Terabytes of data on their customer's ecosystem. Our client told me to stop celebrating because they could not find ANYTHING. If the organization does not know what it knows, then every project starts from scratch. And it is nearly impossible to create a seamless ecosystem solution without Steve Jobs.

A good CXI will accumulate every project, every design, and their understanding of customers in a way that it can be accessed and reused. Otherwise your customer-centered design practice will have the memory of a goldfish (3 seconds) and keep re-research and re-solving, and re-designing until you run out of patience.
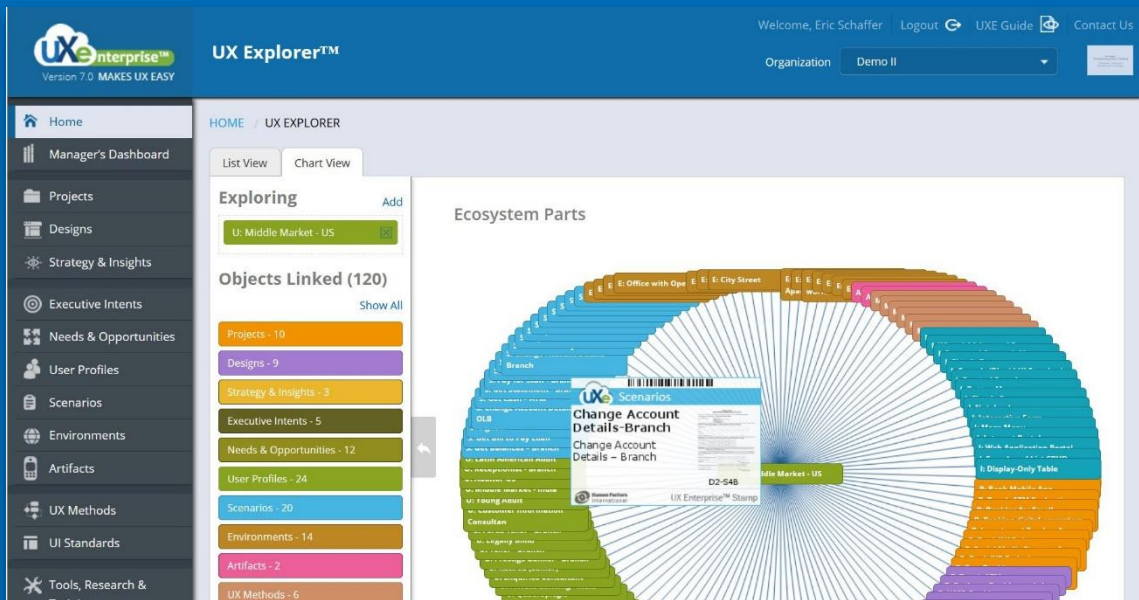
Integrated Delivery

My son Noah has a doctorate in the field and has been an executive strategist in HFI for about a decade. He pointed out that there is one store in New York City that sells just buttons. And there are a very few people (like him) that would occasionally buy amazing buttons and sew them on a shirt. But most people just want to buy a shirt. Just so, most organizations just want a solution.

The thing that makes a CX Integrator invaluable is that all the necessary resources are collected in one place. One organization delivers the UX strategy, service design, interface designs, visual designs, physical designs, SEO, content, coding, hosting, metrics, and maintenance. In that way the customer-centered design flows directly into a deliverable solution that is hosted, maintained, and measured.
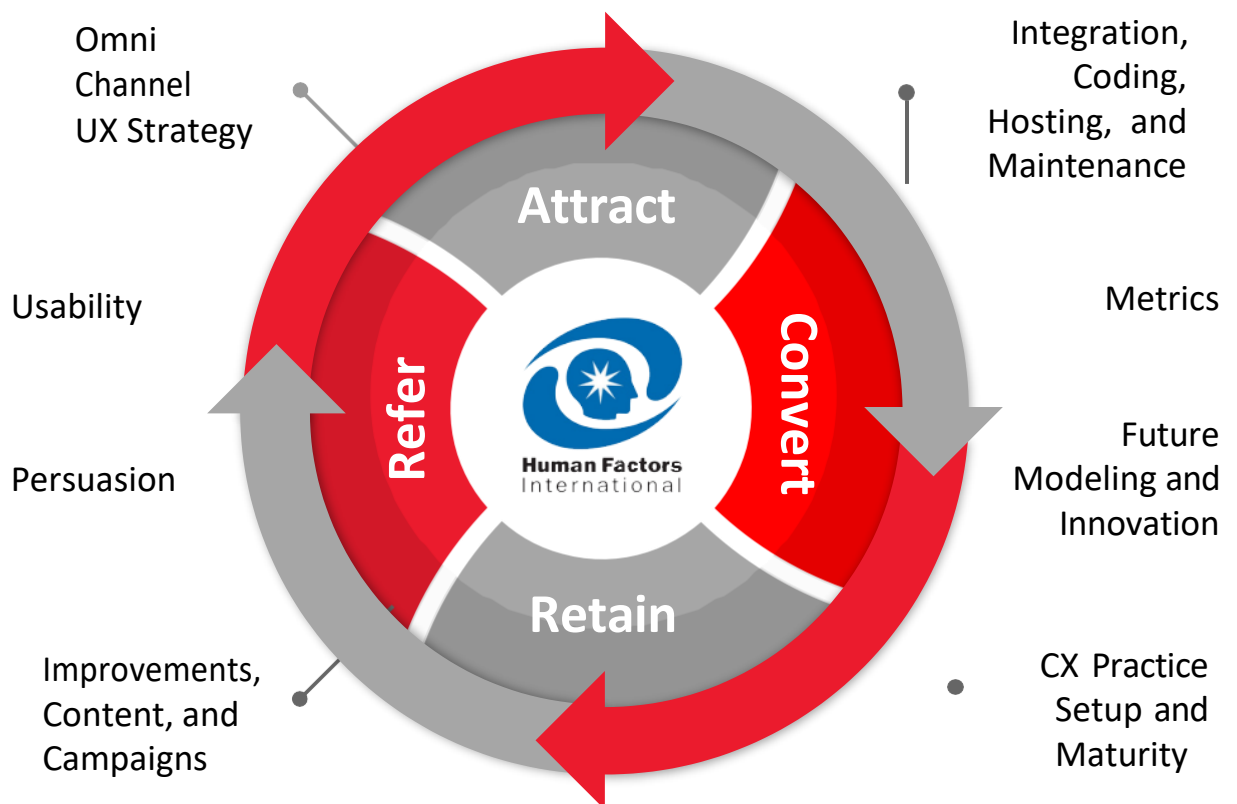
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CX STRATEGY
AND SERVICE DESIGN

We Take Full Accountability For End-To-End CX Solution Delivery

Human Factors Design Science

Driven by Model of Customer Ecosystem

Omni Channel UX Strategy

Integration, Coding, Hosting, and Maintenance

Usability

Metrics

Attract

Refer

Convert

Human Factors International

Persuasion

Future Modeling and Innovation

Retain

Improvements, Content, and Campaigns

CX Practice Setup and Maturity

Metrics

To some extent your business metrics do a great job of charting success. When we see leads jumping, usage spiking, or calls to the help desk plummet we know we are doing a good job, and all the design work should focus on those objectives. That said, we do much more to measure your customer experience. A good CXI knows very well that Net Promoter Score and other surveys that basically ask "Did you like it? Was it easy?" are rather limited metrics to guide your operations. And it is usually worthwhile to develop a more advanced dashboard of metrics. I'll shortly hop on a plane to the Middle East to help draft those metrics for 190 Ministries. I do like a challenge.

ADOPTED A SCIENTIFIC PROCESS TO UX REVAMP

Objective

- Measure impact of revised UI / UX based on identified metrics and analytics
- Analytics-based inputs for continuous design refinement

FINANCIAL METRICS (COMPARISON WITH OLD APP)

APP STORE RATINGS (COMPARISON WITH OLD APP)

72% more
Transactions / user

42% more
Value of Financial Transactions / user

2.05x more
Non Financial Transactions / user

18x more
Value of Bills Paid / user

75% more
Financial Transactions / user

2.5x more
IMPS Transactions / user

11% better
For Design

15% better
App Stability

14% better
Perceived Resource Usage (memory / battery)

25% better
App Usability

10% better
Perceived App Speed

THE NEXT GENERATION
OF SUCCESS FROM CXIs

Please read the Business Value of Design (McKinsey Quarterly October 2018)*. Again, we see a major study that shows the business value of great customer-centered design. Those results are what motivate the CXI approach.

The transitions are happening. The swell of CX leaders is growing. And the competition to provide easy, compelling, and seamless customer experience is hot and getting hotter. It is a pleasure to be part of this massive movement toward customer centricity. We are truly crafting the future of how people will live. We are crafting the lifestyle of the future and because the CX engineering discipline is being used to its fullest, we can expect that future to be easy and fun.

https://www.mckinsey.com/business-functions/mckinsey-design/our-insights/the-business-value-of-design?cid=other-eml-ttn-mcq-mck&hlkid=55eaae7e6ff54956bf3495cc0a2bce34&hctky=2884389&hdpid=4e5e5ba7-3149-45ce-8149-ece297d9ff4a