The 10 Laws of Customer Experience Engineering

This handy document is your overview of the 10 Laws of CXE. Keep it close for quick reference. Maybe even print it out and pin it next to those adorable pet photos in your office.

CHASSI

1. Know your customer

Start with the customer as a broad definition, and quickly move to the roles, educational profiles, biases, and prior experience of customers as individuals.

At first, this will look pretty chaotic since no two customers are identical. As you continue you will find similarities, especially as they relate to the reasons why these individuals are using this software to begin with.

Many companies miss the opportunity to create synergy with their customers by identifying their core motivations and underlying expectations.

It's important to highlight the *differences* between customers, just as much as it is their *similarities*. And, don't forget to continually revisit this as you grow.

KEY TAKEAWAY

Define and refine the personas that represent your user base. Go deep and get specific.
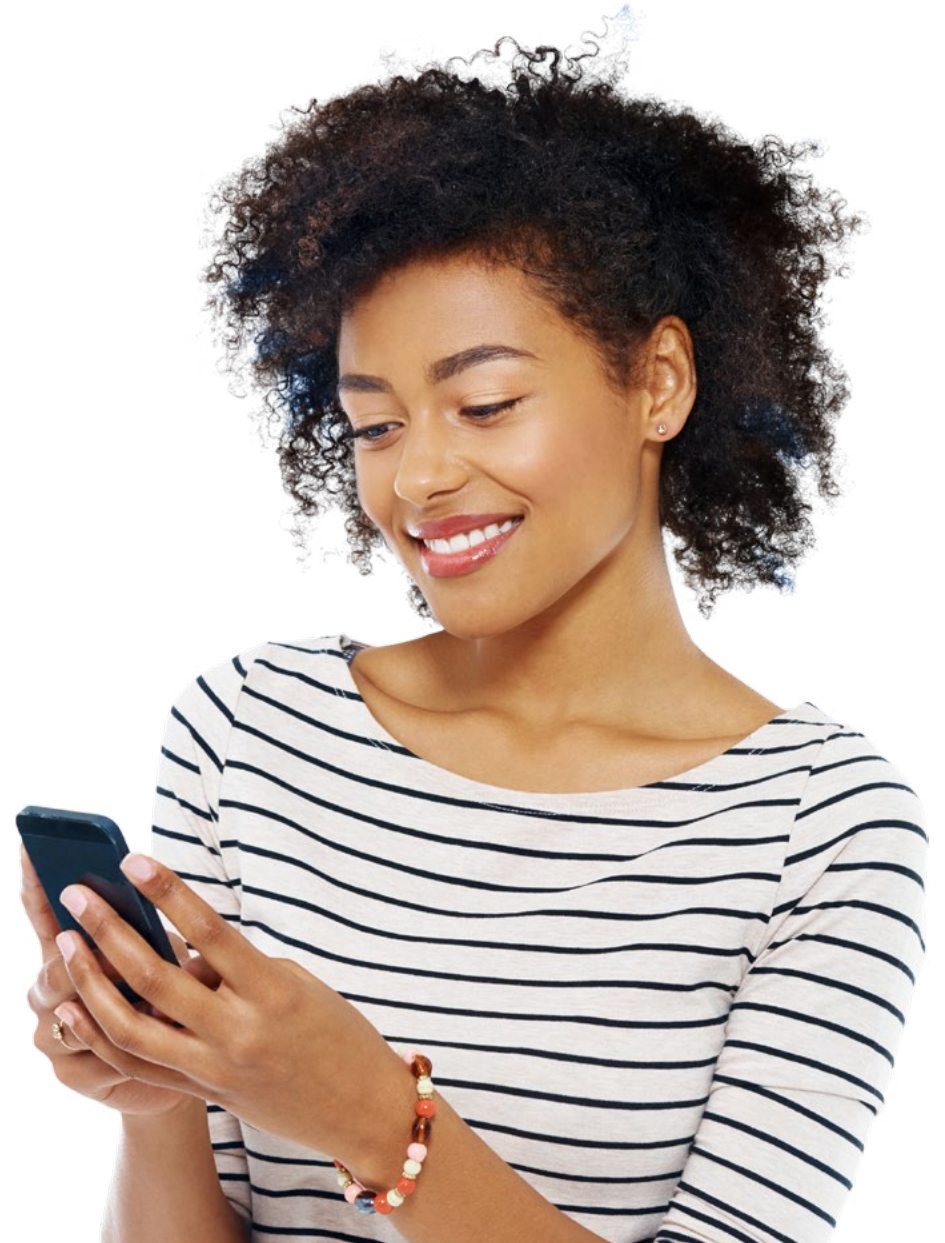
2. Know your own value

Where is the value created within your process and your software? What is essential to convey this value? What activity supports these essential milestones?

Value stream mapping and fish boning are well accepted techniques for business analysis. Apply these disciplines from the customer perspective. Sometimes just a shift in this perspective provides valuable insights to the team.

When applying CXE it is absolutely vital because knowing where in your process value is created informs where measurements should be taken to monitor it as it occurs.

KEY TAKEAWAY

Determine what the specific parts of your customer experience are that deliver the most value.
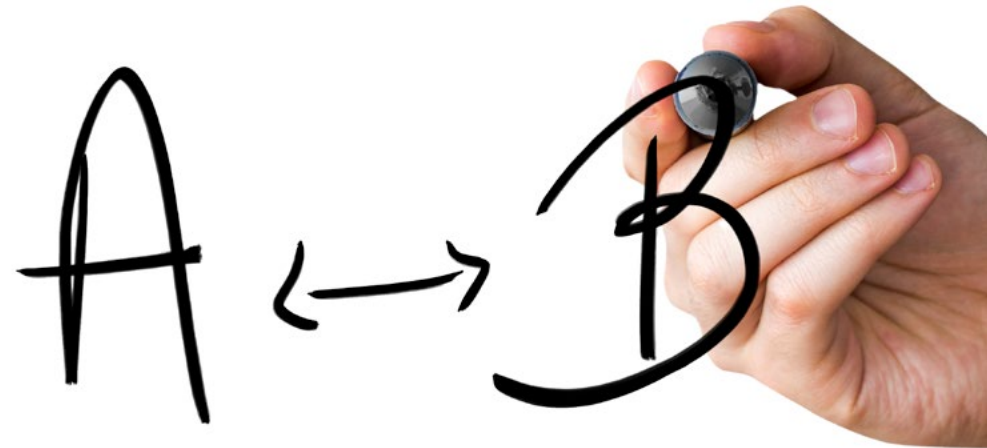
3. Define comprehensive lifecycles

Customer lifecycles must be comprehensive, including all possible steps to be taken as a user gets value from the software. An exhaustive approach is necessary so that a customer's progress can always be defined.

Once drawn, value delivered (positive or negative) can be attached to any given lifecycle step. Likewise, additional information can be laid atop this framework, including expectations of timing, volume, and messaging attached to each step.

This framework is the essence of CXE because it lays out the entire experience in an objective and rigorous manner.

PRO TIP

Keep in mind that customer lifecycles can include elements of activity that take place outside of your software. Expectations set by sales teams, technical support calls made to your help desk, and every other customer facing function should be considered.

KEY TAKEAWAY

Comprehensive lifecycles are necessary so that a customer's progress can always be defined.

4. Consider analysis at the outset

The purpose of CXE is to *enable analysis based on holistic user data*. We collect data as each user navigates the software and attempts to use it. As this occurs, we do an analysis both in real time and retrospectively. We must plan for this analysis so that we can make sure we have all requisite information collected.

This requires a lot of forethought. Just as we considered various paths a user might take along a lifecycle, so should we consider the information of importance to complete an analysis and evaluation of that user's experience.

How will we know when value is conveyed and how will we compare baseline measurement to ongoing process improvement? The answers are as unique as the software to which CXE is applied.

PRO TIP

Remember that experience is not the same thing as activity, and a frustrated user may look like a very active one.

KEY TAKEAWAY

Plan for analysis so that you can make sure you have all requisite information collected.

5. Identify data to be captured

In addition to the analysis, we should include all of the contextual data (metadata) that gives meaning to the data collected as this software is used. Sometimes this requires identifying prior experience, external events that impinge on customer experience, system performance and other factors.

A customer's experience is not a unitary thing — it exists in context, so capture all contextual data that might be useful in analysis to help explain the behavior we are trying to influence.

KEY TAKEAWAY

Plan ahead to capture all metadata that might be useful to explain customer behavior.

6. Plan for controls & indicators

What process controls are important to your user's experience? Do system outcomes depend upon the volume of concurrent usage? Does concurrent load indicate much about individual user experience? What is the effect of attempting to use this software in any non-ordained sequence?

By focusing on controls that add to customer experience, and creating indicators that might show user problems before they become technical support requests, we can anticipate events and consequent reactions so that the user is never stranded or left to wonder, "What next?"

KEY TAKEAWAY

Focus on controls that add to customer experience, and indicators that will highlight potential issues.

7. Be aware of customer preferences

CXE offers an opportunity to create an automatic reaction to various customer experience endpoints and processes. Alerts, triggers, and similar responses to customers who, for example, either take too long, miss steps, or fail to experience the value of the software, can be automated. Human intervention is also possible, depending on the company's preference.

CXE embraces orchestration as a key tenant of its purpose. By creating action based on the data we collect, the framework developed at the heart of CXE becomes an enterprise resource, drawing together and focusing the efforts of a myriad of client-affecting resources on the same endpoint – the user.

Even offline activity can be brought into alignment with online activity and the entire enterprise can share in the rewards brought about by knowledge of the customer's true progress and the value provided. Imagine the ability to create stickiness within Sales at renewal time that comes from the ability to actually prove the utility provided so far.

KEY TAKEAWAY

Account for customer preferences when setting alerts and triggers.

8. Do no harm

Just as orchestration creates the opportunity for action on behalf of, and in service to the customer, it may also provide distraction or concern if done without customer consent or at inappropriate times.

Remember "Clippy?" Clippy was an iconic addition to the Microsoft Office suite some years ago, and it was meant to provide "helpful tips" and interact with the user to make adoption of newer features a bit easier.

Many people felt it was intrusive and bothersome and so disabled it entirely. It became something of an embarrassing joke and a reminder that helpfulness is in the eye of those being helped, not some oracle that stands above and unilaterally decides where help is needed.

Engagement and orchestration require a sensitivity to customer preference and context. Helpfulness will be judged by your users, not by you, and the lighter touch may be better for users who are not "stuck" or "in trouble."

KEY TAKEAWAY

Engagement and orchestration require a sensitivity to customer preference and context.

9. Use data to continuously tweak

CXE was meant to be performed in iterations. It is usually the case that the first implementation may miss the collection of some data, or mis-identify journeys through a lifecycle.

For example, do not expect that an early stage, first-release application will get the CXE tuning correct the first time through. Adding measurements is common once data begins to flow and coalesce.

The CXE discipline is best served when it is approached as an evolution of understanding, drawing from the data collected and building upon it as inferences can be made. CXE demands that you watch your customers as closely as possible, testing hypotheses until you have a relatively correct model of their behavior.

The analytical approach CXE defines provides value from the outset, but this value builds over time as many customers take similar journeys through the lifecycle framework. Regular observation of the data will change the approach you make for adding new features and judging their usefulness.

KEY TAKEAWAY

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10. No silos allowed

Perhaps the most important consideration is that CXE demands an enterprise approach. Customer Success is not a department, it is an ideal shared across departments.

Perhaps this is the greatest failing of other CS approaches – they tend to reinforce the thinking that CS is an afterthought, or something solely in the portfolio of Product Development or Product Management, or worse still, Information Technology.

CXE is a team sport, and it requires the collaboration of many enterprise functions – Sales, Marketing, Product, Operations, Support, and yes, IT. The more central the adoption of the CXE process, the more likely it will be to succeed.

KEY TAKEAWAY

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About the authors

The Chassi team is comprised of software industry veterans. Our six-person executive team are all software industry experts with more than 125 years of combined experience building, launching, and scaling successful software businesses. From founding and scaling startups like WebPT and DrFirst, to leading within large enterprises like Siebel Systems, BlueCross BlueShield, and Oracle, the Chassi team is intimately familiar with the challenge of staying ahead of unforgiving customer expectations and market demands.

We have launched successful applications and enterprises that are collectively worth billions and we have the scars to prove it. Since the dawn of the cloud, we've experienced the market focus shift from 'product capabilities' to 'customer experience', and we've been wrestling with this problem for a long time.

We're business operators, product leaders, and technologists who are excited to usher in the next evolutionary leap in customer experience with CXE.

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