CHAPTER

4

Designing Live Customer Experiences

Maximizing "Face Time"

One of the more visible ways design thinking can be manifested is through live customer experiences, meaning the ways a customer interacts with your brand and business in person. In fact, now that the customer experience has become recognized as an important part of the success of a brand, a specialized marketing discipline has emerged: *experiential marketing*.

Experiential marketing allows customers to engage and interact with brands, products, and services in a sensory context, helping them connect with the brand in meaningful, personal ways. These personal interactions and the connections they build lead to informed purchasing decisions. Designing live customer experiences propels your brand beyond the narrative of the features of your product or service; customers experience the benefits firsthand.

You can leverage design thinking tools to create brand interactions with purpose and meaning, and to do that effectively, you must be able to empathize with your customer. Quite simply, if you were your customer, what would your expectations for your brand be? How would you want to interact with your brand and business? What would you want to derive from that interaction? What would you want to feel afterward?

From the physical space your brand occupies to customer service processes to employee training, every touch point with a customer is an opportunity to showcase your brand, set the tone of the customer conversation, and build loyalty.

Your Bricks-and-Mortar Location

If your business has a physical space—an office, warehouse, retail store, or open space—this is where a brand's first impressions are often made. Putting some thought into how your brand interacts with a customer in a physical space is particularly important for those businesses with revenue models that rely heavily on person-to-person transactions. Let's put this concept into personal terms as an example.

Imagine you are hosting someone very important at your home for dinner. Perhaps they are your future in-laws, your banker, the chairman of a nonprofit on whose board you serve, or a prospective new executive you are considering hiring. You want to put your best foot forward, right? You give your house a thorough cleaning, arrange freshly potted flowers on the front porch, set the table with your best china, and maybe even check to be sure your medicine cabinet doesn't contain anything questionable. We've all done this (or similar things) because we wanted our guests to feel welcome and comfortable, but also because we wanted to portray ourselves—our personal brand—in a certain light.

Now let's put this in business terms. Imagine you are hosting a potential customer for a meeting at your office, during which you hope to close a deal that will result in doubling your gross revenues for the fiscal year. Is your office designed to provide the type of experience with your brand that you want that customer to have? Or is your space somewhat haphazardly put together without any consideration of your brand?

If your physical space is a retail store, is it welcoming without being overwhelming? Is it designed to engage customers as they navigate the space? Is your team trained to provide a specific interpersonal experience for customers?

To evaluate your brand experience in terms of physical space, as honestly as possible, put yourself in your customers' shoes. Better yet, recruit a few of your leadership team and friends to join you and gather several perspectives. For illustrative purposes, I'll use a retailer as the first example, because I believe retail is one business sector with the most to gain when the live customer experience is designed.

Start evaluating from the parking lot: is the area clean, and does it feel safe? Is your entrance well marked, attractive, welcoming, and free of debris? These points seem basic, but they are essential and often overlooked.

Tip Don't give a trashy first impression. Make sure your parking lot or car park, sidewalks, and breezeways are clean and debris-free.

Next, evaluate the customers' experience when they arrive at your store. Do the interior design, merchandising, and product selection align with your brand? For example, if your business is a specialty running store and you've defined your brand as approachable, egalitarian, and friendly, does the interior of your store support that brand message with open spaces, welcoming but energizing colors, and places to sit? Does your product selection appeal to beginners as well as experienced runners? Does your merchandising and signage encourage the customer to explore your store? Is the lighting appealing and sufficient? If you have a music system, what's playing? I had a completely incongruous experience in a specialty running store in Scotland, in which the system was broadcasting country-and-western music with predominantly slow tempos not at all conducive to running. Rather than feeling energized, ready to run, and hyped up for new gear, I felt slower, more relaxed, and in no hurry to make a purchase—certainly not the customer experience the brand intended.

What if you have an office rather than a retail space? The approach is similar. Start from the parking lot and work your way inside. If your office is on an upper floor, take the elevator and perceive it through your customer's viewpoint. Is it too slow? Do the doors close too quickly (especially important if your customers tend to be older or physically challenged in some way)?

Once you arrive at your office, does your reception area or lobby reinforce your brand? For example, a conservative health care corporation may furnish its lobby in traditionally styled, dark wood furniture accented with oriental rugs and classic still-life painting reproductions. A cutting-edge architecture firm, on the other hand, may design its reception area with reclaimed materials, ultra-modern furnishings, and colorful, original artwork. If the physical setting of your reception or lobby is incongruous with your brand message or devoid of any attention to detail, then the customer experience is one of confusion and uncertainty, which is not the first impression you're counting on.

Carry this evaluative process throughout the public spaces of your office or retail space, and pay attention to detail. Restrooms, dressing rooms, conference rooms, and work areas are opportunities for reinforcing the experience you purposefully design. They are also where an experience that started off beautifully can deteriorate, sometimes irrevocably.

Color Theory and You

> *Color is important as the effects are instantaneous; for example blue connects the human mind to the universe and alleviates any sense of tight enclosure or claustrophobia that could occur in a windowless environment.*
>
> —Leatrice Eiseman, director of the Eiseman Center for Color Information and Training[1]

Explanations of color theory are plentiful on the Internet, and you can find a much deeper history of its evolution and role in marketing, as well as behavioral science. Here I'll touch lightly on how color theory comes into play with regard to designing physical space, and color's effects on live customer experiences.

Simply put, color theory attempts to explain what feelings specific colors evoke and why. I say "attempt" because color is a highly subjective design element. The emotion a color evokes in one person could be markedly different in another. The reaction to color can be influenced by personal preference as well as cultural perspective.

Tip Avoid the tendency to design your office or store based on your personal preferences, especially when it comes to color. Put your brand's identity and personality before your own.

There are widely accepted generalities that you should consider when evaluating your physical space in terms of the customer experience and supporting your brand. You'll notice that some colors seem to evoke feelings that are quite different from each other, a result of how—and how much—the color is used in design.

Warm Colors

Warm colors include red, yellow, and orange and generally convey passion, happiness, enthusiasm, and energy.

- Red, a primary color, and its various hues can be used to communicate power and passion, as well as danger. Brighter reds have more energy; muted, darker reds have more elegance.

[1] Personal conversation with author.

- Yellow, which is also a primary color, can be perceived as happy and hopeful, but also as cautious. Softer yellows convey a sense of calm, whereas darker yellows with a more golden hue can convey wealth or permanence.
- Orange is vibrant and energetic, and is often associated with vitality and movement. Orange garners attention in a way that is considered less aggressive than red.

Cool Colors

Cool colors include blue, green, and purple, and they are considered calming, soothing, and less intense than their warm counterparts. Therefore, these colors and their various hues are frequently used to convey a sense of professionalism and maturity.

- Blue is most readily associated with calmness, responsibility, and peace, with darker hues conveying a greater sense of stability and strength while lighter hues feel refreshing.
- Green is the color of nature and almost universally conveys a sense of life, growth, new beginnings, and wealth. Brighter greens, incorporating a lot of yellow, are energizing and inspirational. Alternatively, darker greens that include more blue than yellow are seen as stable, solid, and reliable.
- Purple has long been associated with royalty, wealth, and spirituality. Darker, richer hues of purple convey wealth and regality. Lighter purples, such as lavender and lilac, are more commonly associated with spirituality and romance.

Color in a business's physical space can go a long way toward creating the type of environment—and by extension, a type of feeling—you want your customers to experience. In terms of your particular business, color should be used to reinforce your brand and its image. For example, a plant nursery would certainly lean toward using a lot of green—symbolizing nature, life, and growth—in its physical environment whether through the plants it stocks, paint and decorative elements, or both. However, a nursery may also want to punctuate its environment with yellow (happy) and orange (energy), both of which appear frequently in natural settings. Alternatively, a financial adviser might opt for shades of blue (professionalism) and purple (wealth).

If the colors in your physical space aren't aiding in creating the kind of experience you want for your customers—such as too much red in a psychologist's office or too much blue in the gym—don't despair. More often than not, a new paint color will put your space back on the right track. If painting isn't an option for you, or if a lot of your color comes from your furnishings, you still have alternatives. The psychologist with too much red in his office can temper that fire with cooler colors by incorporating a few accessories in shades of blue or purple. The gym owner could energize the workout environment with shades of orange or yellow.

The Human Element

Truly, nothing can make or break a live customer experience than the human element—your team. You know this because you've experienced it firsthand in your own encounters with brands. I'm willing to bet that the businesses you frequent most deliver a customer experience that has made you feel welcomed, understood, appreciated, satisfied, or some combination of these. You shouldn't deliver anything less to your own customers. To ensure that great experience, you need to indoctrinate your team members. They need to be living, breathing representations of your brand with a commitment to the Golden Rule: treat others as you want to be treated. It works in life, and it works in commerce.

One of my favorite design thinking tools for training teams to create knock-'em-dead live customer experiences is the empathy map. Empathy makes the word go around smoothly; without it, we have misunderstanding and disruption. The empathy map tool leads teams through a process that helps them develop empathy for the customer, which leads teams to craft experiences that they—as the customer—would want.

Create an Empathy Map

The goal of the empathy map in terms of customer experiences is to gain a deeper understanding of customers, and their wants, needs, and expectations with regard to their interaction with your team, business, and brand. I liken the process to the cliché of walking in someone else's shoes; the empathy map is the metaphorical pair of shoes. Creating an empathy map can be simple and completed in less than thirty minutes, which makes it a doable exercise to conduct during a staff meeting. It is the perfect place to start your team's training in designing customer experiences.

Ideally, you'll conduct the Empathy Map exercise with a team of no more than ten and no fewer than four. If you are a sole proprietor or a young start-up with a very small team, consider asking your spouse, a mentor, a friend, or any other trusted advisors and individuals to join you.

To start, you (or your moderator, if you choose to use one) will need a large whiteboard or flip chart and markers in at least two colors. In the center of the board, draw something that represents your customer. I often use the ubiquitous "Hello, my name is _____" name badge with "Your Customer" in the blank. It's easy to draw and everyone recognizes it (Figure 4-1). Across the top of the board, write out the topic you want to address in the exercise. In this case, it's "Our customer's experience in our store/office and with our team."

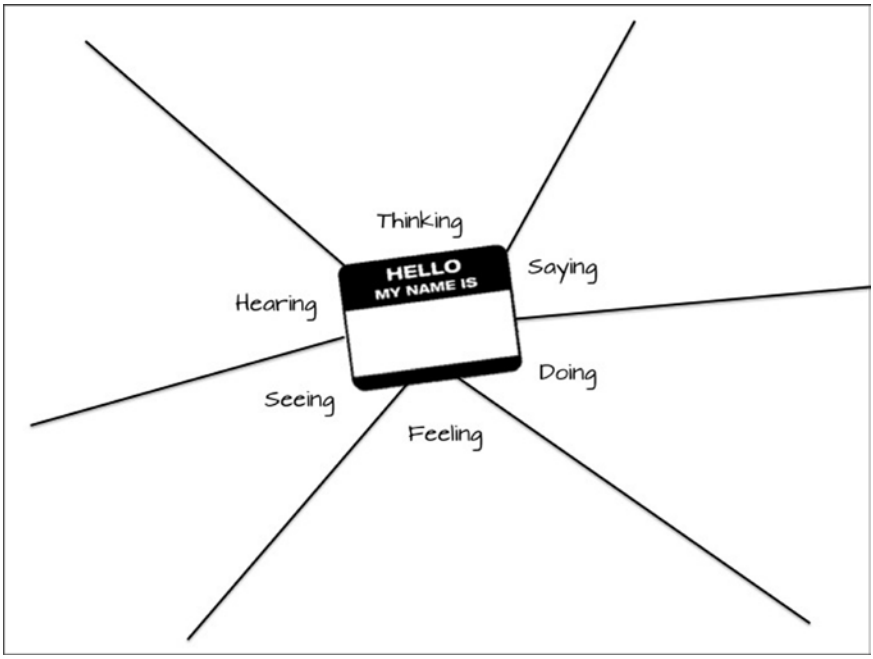

Figure 4-1. Empathy Map activity diagram

Then divide the remainder of your board into six sections, radiating out from the name badge image. Label the sections "Thinking," "Hearing," "Saying," "Doing," "Seeing," and "Feeling." Now it's time to put on those metaphorical shoes and start walking. Have everyone participating imagine him- or herself as your customer with the intent of populating the diagram with real sensory experiences from the customer's point of view.

You can start populating the diagram from any section, and the order in which you fill it in doesn't matter. In fact, you may find yourself and your team jumping among sections as the responses flow. Note the most common question from participants at the beginning of this exercise is "Are we saying what the customer is thinking/hearing/saying/doing/seeing/feeling

now, or do we say what we *want* the customer to think/hear/say/do/see/feel?" This is an extremely valid question and begs for clarification.

In a perfect world, the team would stay focused on the customer's responses as they would be in the present. If those responses don't align with what the experience should be, address that separately with a different design thinking tool like Microscoping (see Chapter 7). However, the world isn't perfect and that singular focus on the "now" can be difficult to maintain. Rather than force the issue, I let groups respond in terms of both "now" and "want." This allows you to capitalize on the inevitable brainstorming around the customer experience that arises during the Empathy Map exercise. The key is to distinguish between the "now" and "want" by using different colors of ink. Be sure to include a key somewhere on the board that identifies which color is assigned to each type of response.

For the purposes of this example, I'll start with "thinking." Have your team consider what the customer is thinking during a live customer experience and write those thoughts in the diagram, using the terms and language your customer would use. Using the specialty running store as an example, the customer might be thinking, "I'm not sure what questions to ask," "This employee is really listening to me," "I feel comfortable in here even though I'm not a serious runner." Remember, the point of the exercise is to empathize with customers so you can design a live experience they will appreciate. Continue on in this manner through all of the senses until the diagram is complete.

Now that your empathy map is complete, you have a lens through which you can view your business, your operations, your staff's training, and your product and service offerings from your customer's perspective. Understanding the customer's perspective and adopting it as your own are invaluable as you move through the following design thinking exercises to design engaging, live customer experiences.

Note If in the process you find that you don't know as much about your customer as you thought, and you have gaps in your empathy map, that's okay. Now you'll know what areas in which you need more research to better understand your customer.

Mapping the Customer Experience

Now that you better understand your customer after using the empathy map design thinking tool, what do you do with that knowledge? You design the live experience your customers most desire. The customer journey map (CJM) is a visual means by which you design how a customer

interacts with your business and brand. Originally and still effectively used in service design, the CJM identifies all the touch points where a customer interacts with your business, including decision making and exit points, where delivering the optimum customer experience can be even more critical than at other points along the journey.

The objective with a CJM is to map a customer's experience with your business. Think of a game board with pathways and a definitive start and finish. Your map at the end of this exercise will look somewhat like a game board with descriptive detail in each space.

You'll need the usual design thinking materials for this exercise as you've used with others: a white board or flip chart, markers, and two colors of sticky notes.

Tip If you haven't stocked up on markers, sticky notes, and flip charts yet, get thee to an office supply store. You'll be glad you did.

Start at "Start"

As with every game—or process, adventure, or analysis—you have to start at the beginning. With a CJM, your starting place is the first point of contact your customer has with your business, and there could be several of them. Returning to the specialty running store example, the starting places for a customer's live experience are the store, the telephone, and online. You may be wondering how an online starting point can be a part of a live customer experience. Consider how often customers—including yourself—search online for directions to a store, look up a store's operating hours, or review products on a store's website prior to visiting the physical location. That activity leads to the live experience and is therefore important to the process.

To create your CJM, on the far left of your workspace (white board or flip chart page), start three rows or paths, with "Store," "Phone," and "Online" as your starting places. Be sure to leave a few inches of space between paths, so you have room to add sticky notes.

Next, pick one path to focus on. For our purposes, let's focus on the store path. The first step along the store path is entering the premises. Draw a square like you would see on a board game and label it "Enter." On one color of sticky notes, have your team write short descriptions of what the customer's experience is now on entering the store. For example, "Customer squints because there isn't enough light to see," or "The sightline is open, so the customer can see the whole store at a glance." On the other color of sticky notes, have your team write short descriptions

of what you want the customer's experience to be: "Customer sees the latest merchandise on display," and "Customer hears the door chime, so he or she knows employees are aware that someone has walked in." If there are descriptions that fall into both now and want categories, great! You should write those descriptions on both colors of sticky notes and put them in their respective areas (Figure 4-2).

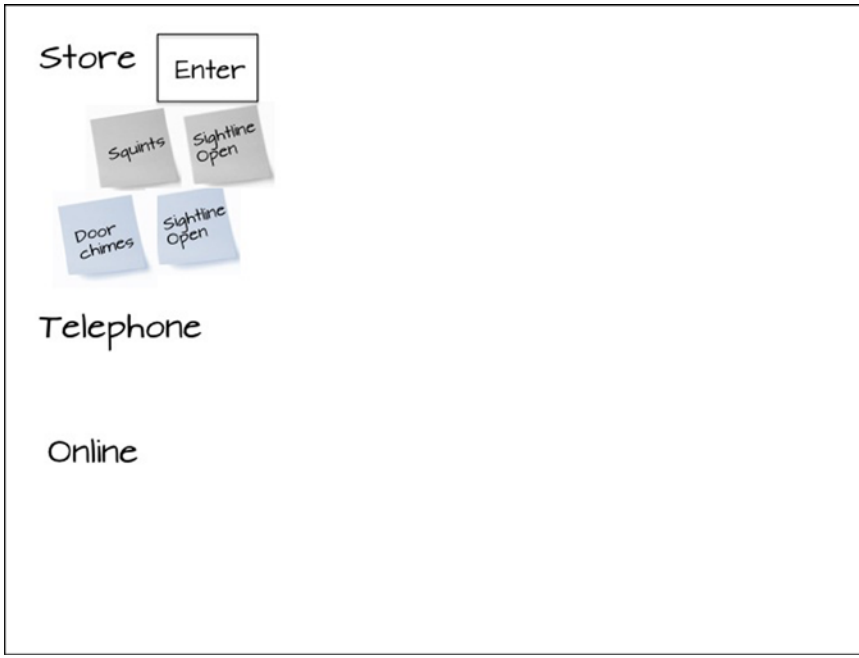

Figure 4-2. Customer Journey Map activity diagram, beginning

Identify the next interaction on the CJM and draw a square. For our example, that interaction is the customer being greeted by an employee, and the square is labeled "Greeting." Go through the same process as you did with "Enter," describing on the assigned colors of sticky notes the customer's experience now and as you want it to be.

A CJM can be as detailed or as high-level as you choose, based on how deeply you want to analyze—and improve—the live customer experience. However, even if you opt for detail, don't get mired down in minutiae. Rarely, if ever, is it necessary to map the experience for every product category or service you offer. You are mapping your customer's journey through the "forest," not their journey up to each tree within the forest.

For the specialty running store example, one of the additional types of interaction is "Browsing Product." Browsing is a "forest" activity—broad and

big-picture. If we broke browsing down into subsections such as "browsing footwear," "browsing apparel," and "browsing accessories," we would be focusing on the trees and could miss the forest (a.k.a. big picture) entirely.

To flesh out the in-store experience for our example, we would add "Foot and Gait Analysis," "Footwear Fitting," and "Check-out" (the "finish" of the game board). For each of these steps along the path, the team follows the same descriptive process used with "Enter" and "Greeting." The end result of the Store path would look something like Figure 4-3.

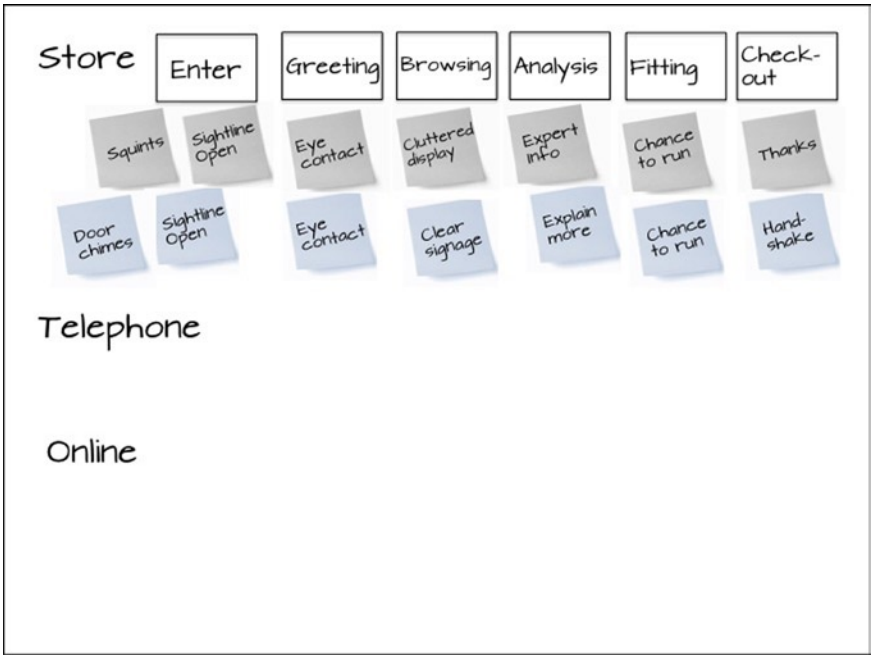

Figure 4-3. Customer Journey Map activity diagram, with one completed path

Note Not all paths will contain the same number of steps. However, each path will have a start, at least one intermediate step, and a finish.

When all of your live customer experience paths on your CJM are complete, review them for commonalities. What shared experiences exist that you want to maintain or reinforce? Are there shared deficiencies between paths that demand immediate correction? Where can you invest your resources to produce the best possible outcomes and improve the live customer experience? Document all thoughts, ideas, solutions, and tasks, and sort them into one of four action lists with thirty-day, sixty-day,

ninety-day, and undetermined deadlines. For example, if the running store customers are squinting as they enter the store because the lighting is inadequate, list "Change wattage of entry lighting; brighter bulbs" on the thirty-day action list. Notice the specificity of the action listed. That kind of detail empowers self-directed action among your team. Push yourself and your team to sort your ideas into the action lists with deadlines, because deadlines are the catalysts for completing any kind of task.

The undetermined action list should be the shortest of them all; ideally it is empty. A task without an assigned deadline has a high probability of lingering without completion. If you cannot determine a deadline for a task, you probably lack the proper information to make a determination in the first place. Therefore, shift your task to finding the information, and put a deadline on it.

When the thoughts, ideas, solutions, and tasks have been sorted into action lists, move on to assigning team members the responsibility of taking the lead in marshaling those tasks and getting them accomplished. Depending on the skill sets and personalities of your team members, the nature of your business culture, and your leadership style, team members could volunteer to lead, or you could directly assign them responsibilities as necessary.

Align Employees to Customer Expectations

Understanding your customer and designing a live experience that is engaging and relevant is invaluable. However, the experience is of no value if your employees aren't aligned and committed to delivering on your customers' expectations. You may have heard the old expression, "You can lead a horse to water, but you cannot make him drink." Now that you've led your employees to the water (the experience your customer wants), this next design thinking tool will help you get your employees to drink (deliver the experience). The Code of Conduct exercise will help you lead your team *and* get them to drink.

Code of Conduct

The title of this design thinking tool is a bit intimidating, and that's all right. Your ultimate outcome from the Code of Conduct exercise is a shared understanding among your team regarding what is required of them individually to deliver a meaningful live customer experience.

In the center of a whiteboard or flip chart, write the words "Pleasant" and "Meaningful." Ask each member of your team to call out what actions, behaviors, and beliefs they believe are necessary to make the live customer

experience pleasant and meaningful. Write each thought and idea on your workspace in a mind map diagram. Group the thoughts and ideas around "Pleasant" and "Meaningful" as appropriate.

For the specialty running store example, contributions (Figure 4-4) could include "Make eye contact when you greet a customer," "Don't appear to be in a rush," "Shake the customer's hand at the end of the transaction, even if they haven't bought anything," and "Encourage the customer to be brutally honest about how the shoes feel."

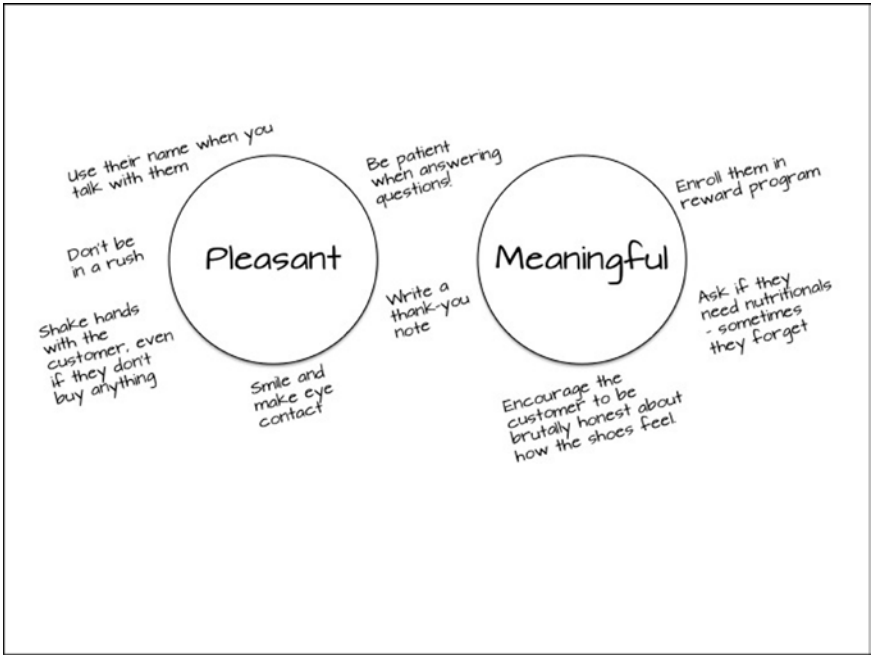

Figure 4-4. Code of Conduct activity diagram

Now quickly review each of the contributions and how they are grouped. Does everyone have the same understanding of each statement? Does everyone agree with how the statements are grouped? Is there anything missing? When your team is satisfied with the diagram, review each statement and ask why it is important to the live customer experience. Document their responses alongside the statement being addressed.

Once all statements have been reviewed and responded to, your diagram will resemble a work agreement that your team has co-created and to which they tacitly agreed. Your role at the end of the Code of Conduct exercise is to review the outcome with your team, noting each statement and the value they assigned to it. Remind them they now have a shared

commitment to follow this code. Granted, it's a sneaky way to get employees aligned, but it works. The key is in the co-creation.

Enforcing the code of conduct and ensuring adherence to the commitment can be a challenge. Ideally, you'll have the type of business culture in which your employees can police themselves in a constructive way so that they keep each other focused and on task, without you needing to be directly involved. Unfortunately, there will be times when you have to step in and correct the behavior of either the code violator, the corrector, or both. It's a downside of being the boss.

Perhaps the best and most relatable example is parenting multiple children. I am a mother of four daughters, and they all know my and my husband's expectations for their behavior. They readily police themselves, and generally that works just fine. Occasionally, though, there are tattletale moments and I have to step in when self-policing is delivered in a nonconstructive way.

One means of ensuring enforcement of the code while minimizing your need to parent your employees is making the code part of your business's culture and conversation. Weave the content of your code of conduct into employee communications, add a review to the agenda of staff meetings, and consider posting the visualized code (Figure 4-4) in a break room or similar space as an ever-present reminder.

Summary

Even though we live and work in a digitally dominated world, live experiences remain a significant and valuable interaction point between businesses and customers. They can make or break a customer's perception of your business and brand, and they are one of many areas that benefits greatly from the purposeful application of design thinking.