

Anatomy of a Missed Opportunity

Closing Culture Lags & Fixing Fractured Processes



We tell participants to call us to update their addresses. But we can't update their addresses; we have to refer them to their plan sponsors. So when a customer follows the instructions on our site and calls us, we tell them to call somebody else.

When asked whether this is a problem worth solving, a WISE SME said:

We get value from speaking with them because we can set expectations for the distribution once their address is updated.

The customer's inconvenience is not part of the equation—and this is coming from the customer support department. But WISE isn't alone in prioritizing TRP benefits & processes over the customer experience.

This is the real problem that's worth solving.

Challenge #1 Culture Lag

Many TRP workers have incorporated the concept of CX into their vocabularies but not into their decision-making.

There's often a lack of understanding that what's good for the customer is good for TRP—particularly as we move into the future and face the twin threats of greater competition from young companies that have successfully baked CX into their organizational DNA and greater expectations from an increasingly sophisticated user base.

This seemingly-simple problem--our inability to manage an address change and reluctance to find a fix--shines a light on another challenge:

Fractured processes

We've set up artificial swim lanes to develop a better customer experience piece by piece. In reality, a customer is likely to cross lanes during interactions with TRP.

We're currently aiming to just deliver a decent baseline experience. But if we were better at communicating and coordinating, our baseline experience could be a pretty good experience by any measure.

With that in mind, I called the person tasked with improving plan sponsor onboarding and learned that this effort is in very early stages. The person handling it is focused on gathering content from the many stakeholders that have *historically* had a hand in this fractured process. The Distributions team is not one of those stakeholders. But just because we weren't part of the past doesn't mean we shouldn't be part of the future. Why not look at onboarding (and other processes) in a more holistic way?

Yes, it's too soon to build these functionalities right now, but shouldn't we be imagining what we want our CX to be and establishing the proper foundation to support our ideals?

**There are only two mistakes one can make along the road to truth;
not going all the way, and not starting.**

- Buddha



Challenge #2 Getting to the Leapfrog Effect

Each journey operates in isolation, both from other journeys and from the rest of the company.

If we knew what related work other parts of the company were doing, we could intersect our efforts when it makes sense to do so.

That would get us to our baseline faster and less expensively, bringing us closer to our goal of getting out in front of our competition.

Call it the Leapfrog Effect.

A need for a new role

Customer Evangelist/CEDTL Communicator

A **customer evangelist/CEDTL communicator** can help the TRP workforce assimilate the concept of CX excellence and design-led thinking into the culture.

A TRP veteran with strong ties throughout the organization who reports fairly high up in the hierarchy would have enough credibility to gain people's attention and the historical knowledge to counter objections. This person would have three primary activities:

1

Help people understand the business rationale behind CX excellence so they can recognize CX opportunities and missteps happening in their departments

Deliver formal and informal training and education on what CX excellence looks like, why we need to achieve it, and how the achievement will keep us strong as we move into the future. When people understand how CX impacts TRP's long-term success (and, therefore, their careers), their mindsets will shift.

2

Turn everyone into a customer evangelist

Build strong relationships & foster a feeling of ownership and excitement among middle management and front-line workers so they learn to actively seek ways to delight customers. By definition, excellent CX has to be pervasive throughout an organization; there's no way to be just a little excellent. The customer evangelist could find ways to get people on board, such as running a sort of bug bounty program to engage lower-level workers in the effort to find parts of processes that could be improved.

3

Expose redundancies and gaps between journeys & departments

A customer evangelist could cross boundaries between journeys as well as other departments, helping the right hand know what the left hand needs/want/dreams about doing. We need to avoid the trap of replicating existing processes, which means rethinking who is a stakeholder and who has value to add *every single time* we build a new system. Easier said than done, unless there's someone constantly asking questions and making connections.