

Transforming vision to reality

Customer journey to service blueprints

CXFS Connect: 2023

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20+ Yrs Consulting in Digital transformation, Digital strategy user experience and Product innovation

Skills

- Architecture
- Industrial design
- User research
- Design research
- User experience design
- Service design
- Experience strategy

Experience

- Institutional asset management
- Wealth management
- Banking
- Insurance
- Healthcare

**How many of you are working on
a CX transformation effort ?**

Successful CX Transformation Requires

1 Holistic Vision

Leverage a human-centric approach and established principles to create a holistic vision for customer experience and business operations.

2 Agile Execution

An enterprise-wide roadmap with a mixed backlog of initiatives sequenced to deliver value early, and that can be easily adjusted.

3 Centralized Governance

An interdisciplinary leadership team that uses the established principles, vision, and roadmap to steer investment in the right direction.

Skillset gap we focus on today

**What tools or artifacts
do you use to represent a holistic
customer experience vision ?**

Two stories

1. Drawer full of customer journeys

“The best consulting in the world has given me these 7 journeys, but I don’t know what to do with it. How should I tell my IT Partner to implement ?“

- CX Director (Large US-based bank)

2. Chasm between vision and execution

“My IT team does not understand my vision and cannot support delivery. I don’t know what to ask of them. “

- CEO (Wealth manager)

“ The business is not clear about what they want us to deliver. They do not give us requirements that we need to implement. “

- CTO (Wealth manager)

87 %

**of digital transformation
projects fail to achieve
their objectives**

Looks like was mostly lucky :-)

What is Service Design ?

Service Design is a human-centric approach to CX transformation. It aligns customer experience (front stage) and the organization's operations (backstage) to deliver value.



Service Design is Holistic

Because it Analyzes & Impacts:

People

Processes

Culture

Policies

Products

Touchpoints

Channels

Technology

Systems

Data



Activities Involved in Service Design



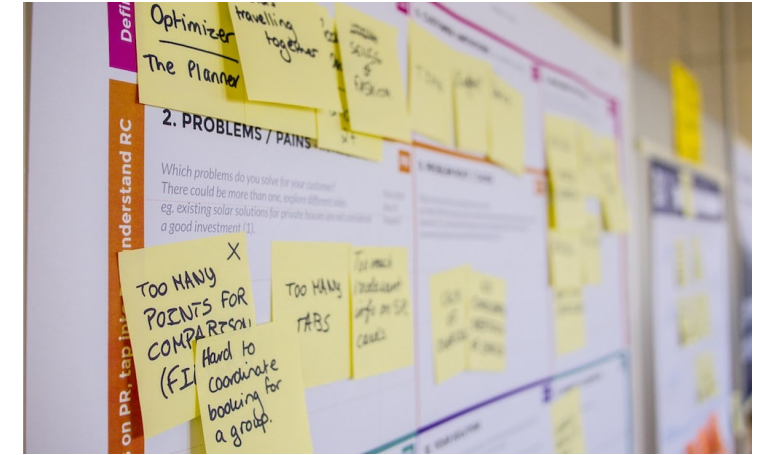
In-depth Research

Conduct interviews and observations to understand and evaluate business processes, tools, and culture.



Service Map/ Blue print

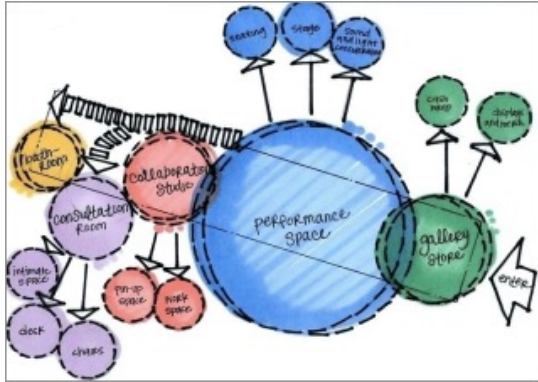
Create current and future state service maps/blueprint that articulate opportunity areas and establish a vision for future operations with new solutions.



Workshops

Validate current state and future state service maps in workshops to drive alignment on the pain points, opportunities, and solutions.

Ways To Communicate a Holistic Vision



Customer journeys

Storytelling about the customer, creating empathy, or communicating new ideas.

Front Stage: Customer actions, Channels/touchpoints, emotions

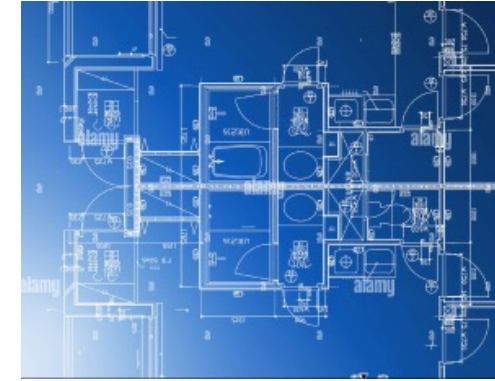


Service map

Align business partners (business operations, IT) with the vision capabilities required to support it.

Front stage: Customer actions and emotions, channels, touchpoints, concepts and ideas.

Back stage: Employee actions and emotions, tools, third parties, concepts and ideas



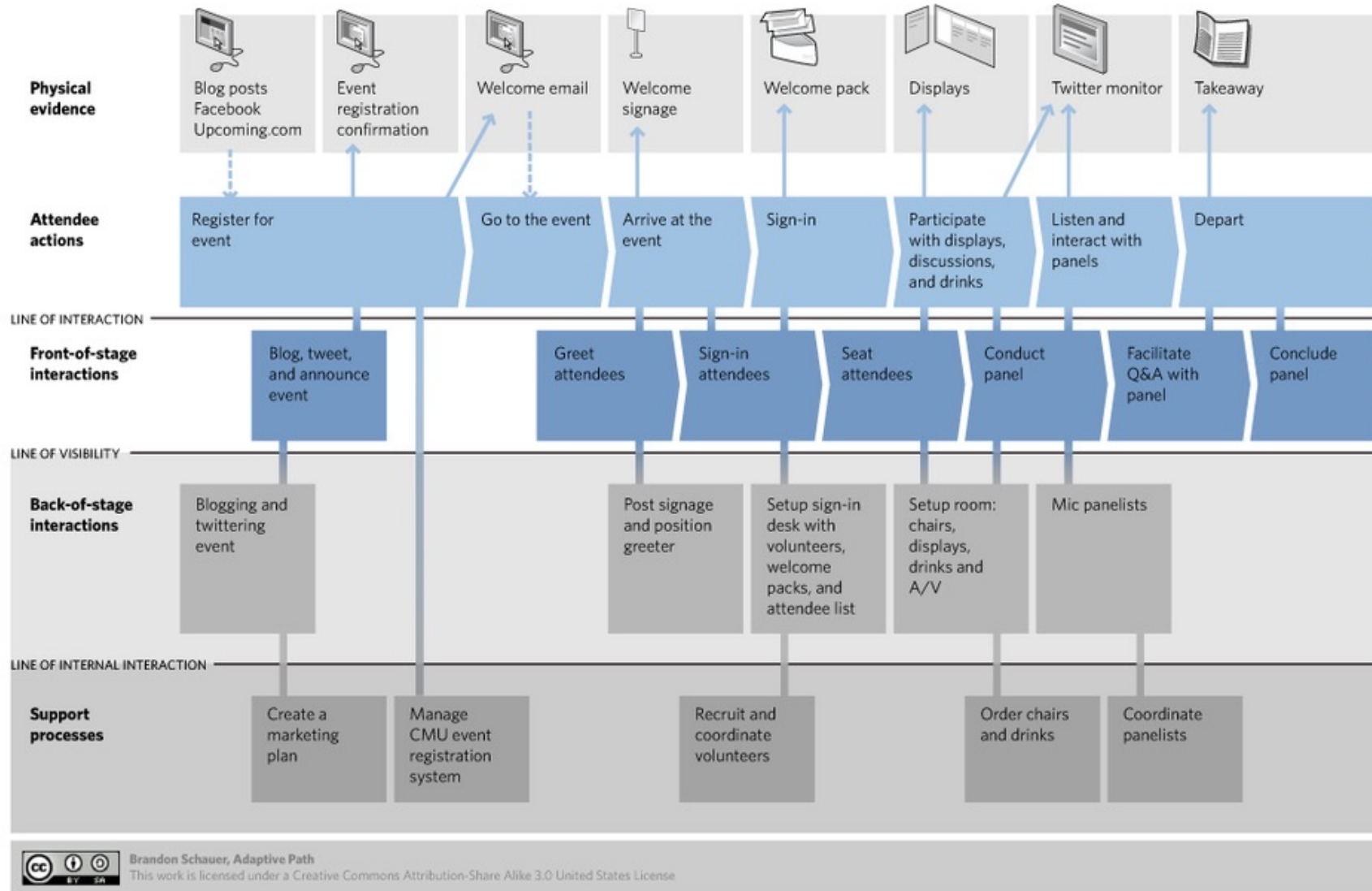
Service blue print

Provide specifications to the a cross functional team to implementation as per the vision.

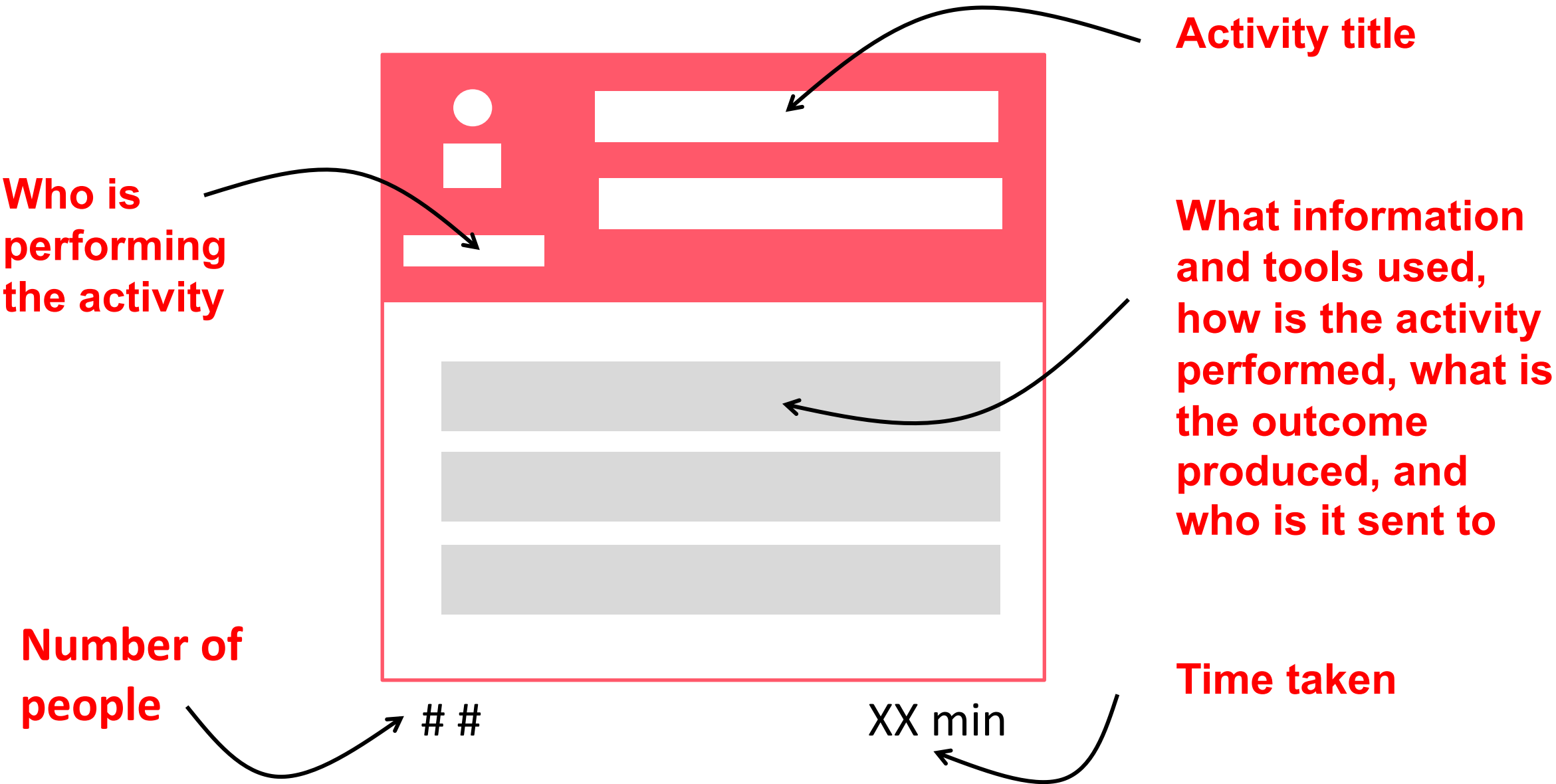
Front stage: Customer actions and emotions, channels, touchpoints, experience requirements.

Back stage: Employee actions and emotions, tools, third parties, concepts and ideas, experience requirements.

Service Blueprint Back in The Days



People Activity



Tool Activity

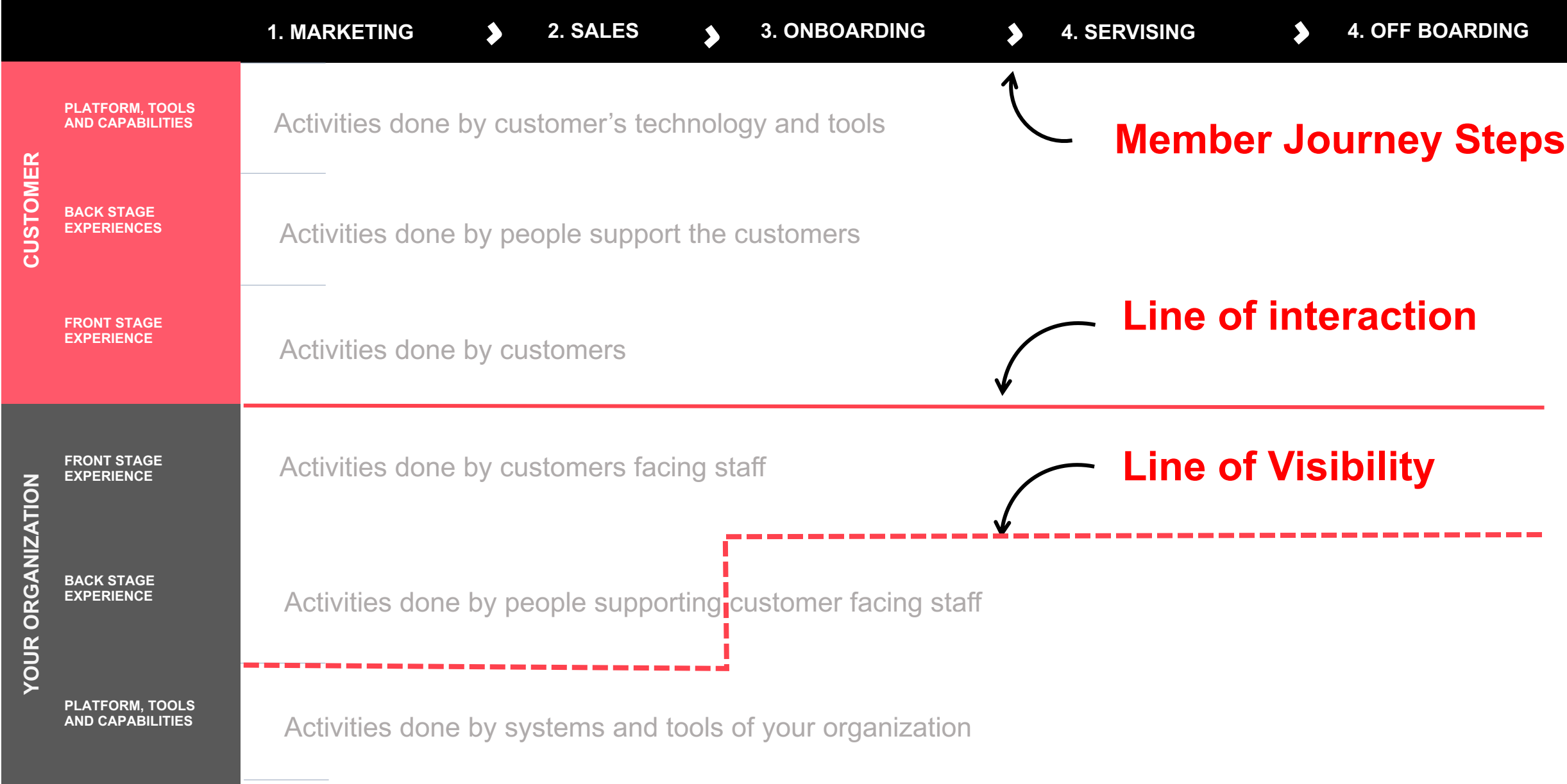
**System/
tool name**

The diagram shows a form for a 'Tool Activity'. It is divided into two main sections. The top section has a dark gray header bar containing a white icon of a microchip on the left and two white rectangular input fields on the right. Below the header is a large white rectangular area containing three horizontal gray bars. Three red text labels with arrows point to specific parts of the form: 'System/tool name' points to the microchip icon; 'Activity title' points to the top white input field; and 'What information used, how is the activity performed, what is the outcome produced, and who is it sent to' points to the top gray bar.

Activity title

**What information
used, how is the
activity performed,
what is the
outcome produced,
and who is it sent
to**

Anatomy of a Service Blueprint



Anatomy of a Service Blueprint



Benefits of Service Design

1.

Creates value for the organization as well as your customers.

2.

Reduces the cost to serve, generates new revenue, and, therefore, eventually self-funds transformation.

3.

Builds organizational empathy and removes cultural roadblocks.

4.

Yields the most effective, holistic solutions that better fit the organization's and customer's ecosystem.

5.

Provides focus for selection of tools & technology, thereby reducing wasteful overinvestment.

6.

Allows for agility and changes as business dynamics and priorities change.

Appendix

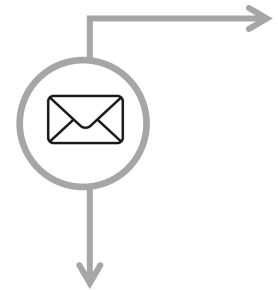
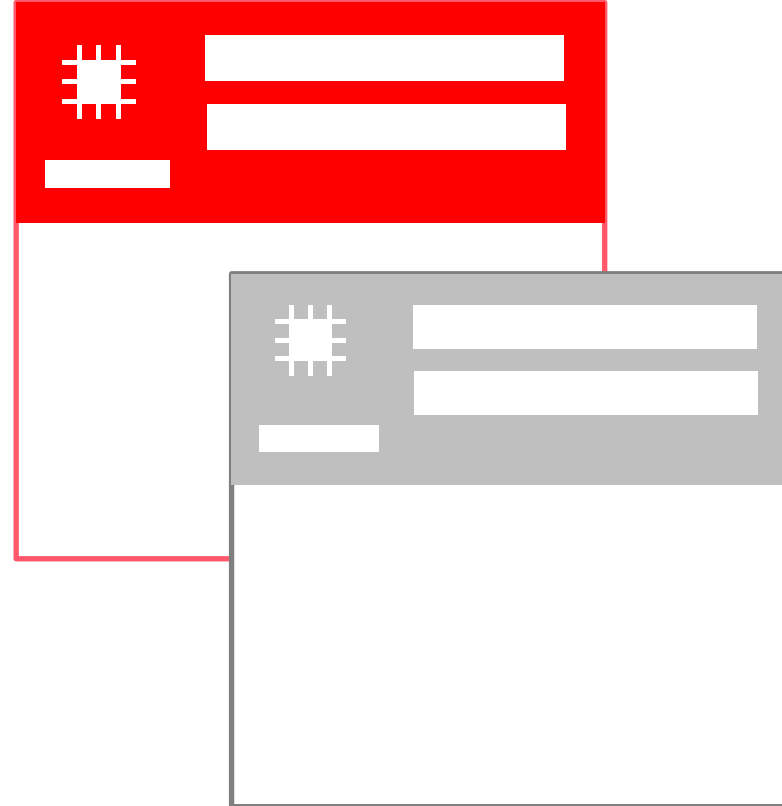
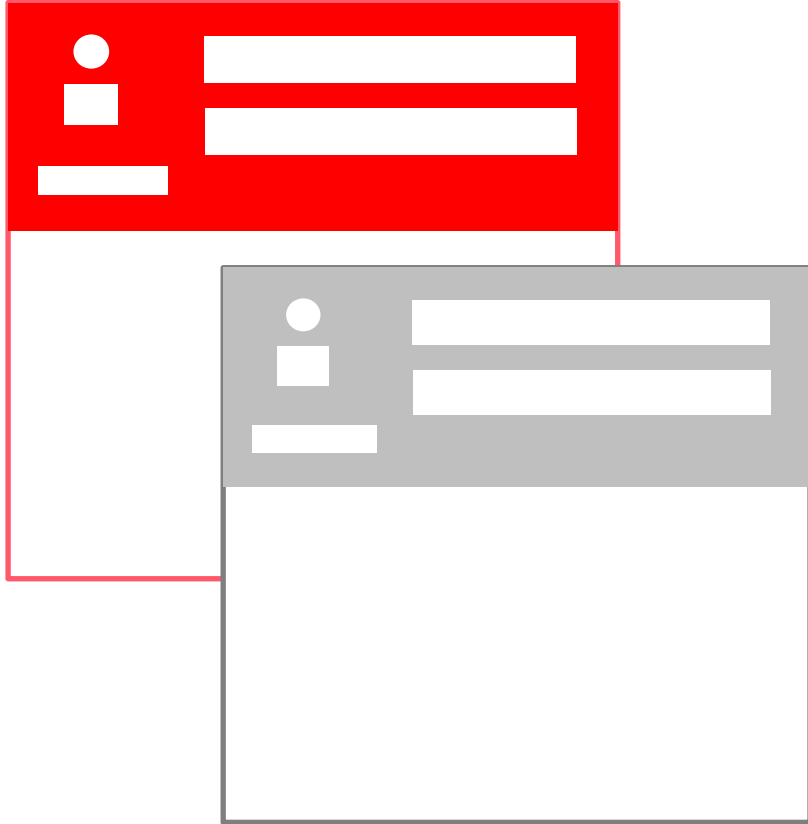
Exercise

You have a customer
50 Yrs age
Wants to Invest 1.5 M
Toward his retirements

**Lets create a service
blue print to provide a
retirement plan.**



Your Tools



Exercise

