

Appnovation

# CX Guide: 10 Steps to Digital Engagement



# CX as a Key Differentiator

Differentiation can be thought of like an ecosystem: an interconnected set of activities that fit and reinforce each other. The more closely a brand builds each activity around a single value proposition, the more difficult they are to replicate, because there's no single thread that a competitor can pull out and challenge. It's all or nothing. The brand becomes incomparable and unbeatable.

To aid companies in reaching that coveted position, Appnovation created a series of white papers with Five Strategies for Differentiated Customer Experience in retail, health and insurance. The papers explore strategies for connecting emotionally with customers, based on five essential elements:

- **Empathy** – knowing your customers and truly understanding what it's like to walk in their shoes
- **Personalization** – making each individual customer feel like the only customer who matters
- **Satisfaction** – appreciating that people don't buy products, they pay for a sense of fulfillment
- **Values** – interpreting customers' attitudes and going beyond just studying past behaviors
- **Trust** – strengthening the delicate bond with customers via dependable interactions and systems

However, CX strategies are one thing, bringing stellar CX to life is another. Structured around the same five elements, this guide drills down into these concepts and provides practical applications for delivering unsurpassed customer experiences that can give brands an edge in any industry.

# Steps

- ☐ #1 - Anchor the design process in EMPATHY
- ☐ #2 - Use lean research to identify customer VALUES
- ☐ #3 - SATISFY through social listening
- ☐ #4 - Prepare your data for PERSONALIZATION
- ☐ #5 - Build TRUST by stating why customer data is needed
- ☐ #6 - Make PERSONALIZATION about more than just a name
- ☐ #7 - Align objectives with customers' VALUES
- ☐ #8 - Grow EMPATHY by bringing customers into development
- ☐ #9 - Create SATISFACTION with inclusive ease of use
- ☐ #10 - Provide resilient, TRUSTWORTHY systems

# Step 1: Anchor the design process in empathy

Brands tend to overestimate how well they understand their customers so it's worthwhile to take the time to really get acquainted with yours. Make **Empathize** the first phase of the design process.

Empathy is an easy word to throw around, but what does it actually mean? How can you ensure you have a laser sharp focus on your customers? At the very least, we suggest that brands:

- Don't build personas based on vague notions of who people are. Explore how customers are impacted at every step of their journey, especially the hurdles they must overcome.
- Go beyond quantitative research and actually speak with customers about what they need. Behavioral data is great, but unless you know why people are behaving in a certain way, it's just information, not insight.
- Explore how customers are interacting with the product or

service and what draws them to it initially. The reason people start buying can be very different to the reason they continue buying. It's important to explore how these contrasts can help you attract and serve further customers.

- Consider the accessibility needs of the customers. Doing so early makes the process smoother and ensures all users enjoy the same emotional experience once the solution is live. Consult the Web Content Accessibility Guidelines ([WCAG](#)) to learn more about assistive technologies.

Another requisite for this approach: **KEEP IT ITERATIVE.**

Inject regular checkpoints to evaluate whether the solution is still in line with the original intention and the current market landscape. Remain nimble and able to shift, as needed. Plans may change. The importance of empathy won't.



## Step 2: Use lean research to identify customer values

To really know your customers, uncover the values that motivate them. The most cost-effective and timely method to do so is with **lean research**.

There are various ways to conduct lean research, but ideally it consists of two main components.

### Qualitative

There's no substitute for talking directly to customers and interviews where they're able to express themselves openly will garner the most heartfelt responses—and the most meaningful insights. There's no need to conduct a copious number of interviews either – five is sufficient. [Nielsen](#) has shown that any more results in diminishing returns. Just be sure the participants fall squarely within the realm of your target audience.

### Quantitative

After attaining conversational input from customers, supplement it with a quantitative survey to provide validation. Though again, this doesn't need to be extensive. 200 people is usually enough to provide sufficient statistical significance and can frame the interview responses with metrics that reveal trends in customer values.



## Step 3: **Satisfy** through social listening

Providing the kind of customer experience that truly differentiates means going beyond simply having a great product or service to offering a positive overall perception of the brand. That requires careful scrutiny of the customer journey and one method for highlighting blind spots is **social listening analytics**.

It involves examining what customers are saying about the brand across social media platforms and can be an eye-opening endeavor. Surveys, interviews, even data can sometimes hide pain points, but customers are often comfortable sharing complaints online. Addressing any negative experience patterns then paves the way for a complete and truly satisfying customer experience.

A leading health insurance provider was curious to understand why they were losing customers, despite having award-winning customer service. After a social listening exercise, it was discovered that even though customers received top-notch support when they reached the service agents, getting through to them was an ongoing challenge. After being equipped with that information, they were able to rectify the problem.

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## Step 4: Prepare your data for personalization

Personalization has become a pivotal component of exceptional customer experience, but it's only as effective as the underlying data that supports it. To prepare data for personalization, Appnovation takes a discovery-first approach that includes a **Data Maturity Assessment**, which looks at all existing data in regard to its:

- Source
- Quality
- Completeness

It's not unusual for a company's data to be spread across multiple databases (sometimes over a dozen!). Siloed data

makes it very difficult to have full visibility into even the most rudimentary metrics, so it's a scenario that must be dealt with by:

- Locating where the data sits
- Structuring and defining the data, e.g., cleaning up naming conventions

There's also a change management aspect to breaking down data silos. A data expert is typically seen as an auditor, but the role could be compared more to that of a therapist, coaxing teams to discuss how their current data infrastructure is and, more importantly, isn't working for them.



## Step 5: Build **trust** by stating why customer data is needed

It's virtually impossible to talk about customer trust without mentioning data. Global customers are becoming more comfortable with sharing personal data, but there's still a need for transparency in the **data value exchange**.

Explain why each piece of information is needed, whether it's the customers' name, email or fitness level. Assure them their Personally Identifiable Information (PII) is secure and will be anonymized, even for internal employees. It shows you appreciate the sensitivity around their data and helps build the bonds of trust.

A leading US healthcare provider built a tool to help people decide which Medicare Advantage plan best suits them. To receive the most appropriate recommendation, users need to provide personal information about their current health and life circumstances. To justify the request, a brief note explains why each detail is required, so the user is informed of the intrinsic value before entering anything in the field. The digital solution has proven successful, quadrupling the completion rate of online sales.

“It's virtually impossible to talk about customer trust without mentioning data.”



# Step 6: Make personalization about more than just a name

After data has been prepared, it can then be used to unearth revelations. At Appnovation, based on the outcome of the data assessment, we place companies on a **Data Maturity Roadmap**.

The roadmap spans from establishing objectives through to using advanced functionality like machine learning and predictive modeling. Here's an overview of the six stage framework:

1. **Foundation** – What to measure?
2. **Hindsight** – What happened?
3. **Insight** – What does it mean?
4. **Prescriptive** – What should happen?
5. **Foresight** – When will it happen?
6. **Cognitive** – Automated decision making

The sixth stage of the framework, Cognitive, is where digital solutions can really transform data insights into an array of personalized experiences. For instance, automating additional touchpoints in the customer journey to nurture prospects. Or having the content a customer is searching for ready and waiting for them when they arrive at a brand's website.

Data becomes most powerful when it's paired with engagement or survey insights, which can support findings and lead to enlightening outcomes and business directions.

When putting personalization measures in place, don't overlook back-end accessibility components, such as alt attributes. That brief bit of text in the code has two functions:

- It describes the image to those using screen readers.
- It impacts SEO and influences which images Google shows in search results.

The alt text language should convey a comparable emotional experience to that of the actual image. It's the difference between saying, "A person stands next to a table," versus "A volunteer serves hot drinks and food to disaster survivors."

Minding that level of detail can enhance the quality of the personalized experience while extending the brand's message to all customers.



## Step 7: Align objectives with customers' values

It's not unusual for objectives and KPIs to hinge on altering customer behaviors, such as encouraging increased engagement or purchasing. Understanding customer behavior is important, but it's even more critical to appreciate the attitudes driving the behavior.

Two people who don't exercise could have similar behavioral metrics, but if one person avoids the gym because they're lazy, whereas the other has a demanding job that doesn't leave time for fitness, those are two vastly different customers, driven by disparate motivations and values.

Appnovation's **Value Index** can help companies decide which of their customers' values to prioritize. Brands can then set customer-centric KPIs to influence behavior in a way that actually fits with who their customers are.

In AirBnB's early days, their New York listings weren't getting much traction. Behavioral data, if they'd had it, may have shown that people don't like to book places in New York. But the actual problem was the photo quality. Recognizing that people value clearly seeing what they're paying for, AirBnB replaced the photos with higher quality images and got the desired behavioral response – bookings doubled within a week.

When considering customers' values, be sure to take into account all the customers that will be engaging with your digital solution, including those who may be using adaptive technologies.

There's more to enabling accessibility than just ticking items off a checklist. For example, if a brand builds an accessible platform, but uses an inaccessible third-party site for their career postings, they've technically created an obstacle for some users, which could raise questions about their commitment to inclusivity. It's a value that's widely embraced by customers, so should be a definite priority for brands everywhere.

“Understanding customer behavior is important, but it's even more critical to appreciate the attitudes driving the behavior.”

## Step 8: Grow **empathy** by bringing customers into development

Just as the design process should include checkpoints for the team to evaluate how a digital solution is progressing, it's also worth checking in with customers during development to make sure the solution still meets their needs. Giving customers a say in a solution's direction develops the relationship, making them feel like they're not just customers, but **development partners**.

Be sure to include customers with disabilities, especially those with learning conditions such as dyslexia or autism, so they can test whether the solution meets their accessibility requirements. Content should be presented such that the visual display and written tone of voice are easily understandable.

Similar to lean research, usability testing doesn't require a large crowd. Five people is enough. Staying close to the customer also allows brands to find out about potential issues much earlier, when they're hopefully less complicated to resolve. It mitigates surprises, both for the brand and the customer.

While building a robust new portal for a leading pharmaceutical company, Appnovation employed design thinking and worked closely with users at each stage of development. Their input heavily influenced design decisions. Beyond just saving time and money, rooting the process in empathy also ensured when the solution went live it fully met the users' needs.

“ Usability testing doesn't require a large crowd. Five people is enough. (Nielsen) ”



# Step 9: Create satisfaction with inclusive ease of use

Many brands equate growth with expanding their customer base when they should be focused on developing a level of loyalty that ensures its current customers never leave. How? By delivering **preemptive satisfaction**.

One way to proactively solve customers' problems is to make it extremely easy for them to find what they're looking for. Remove complex search processes and avoid burying content that's most relevant. Make resources readily available, whether it's:

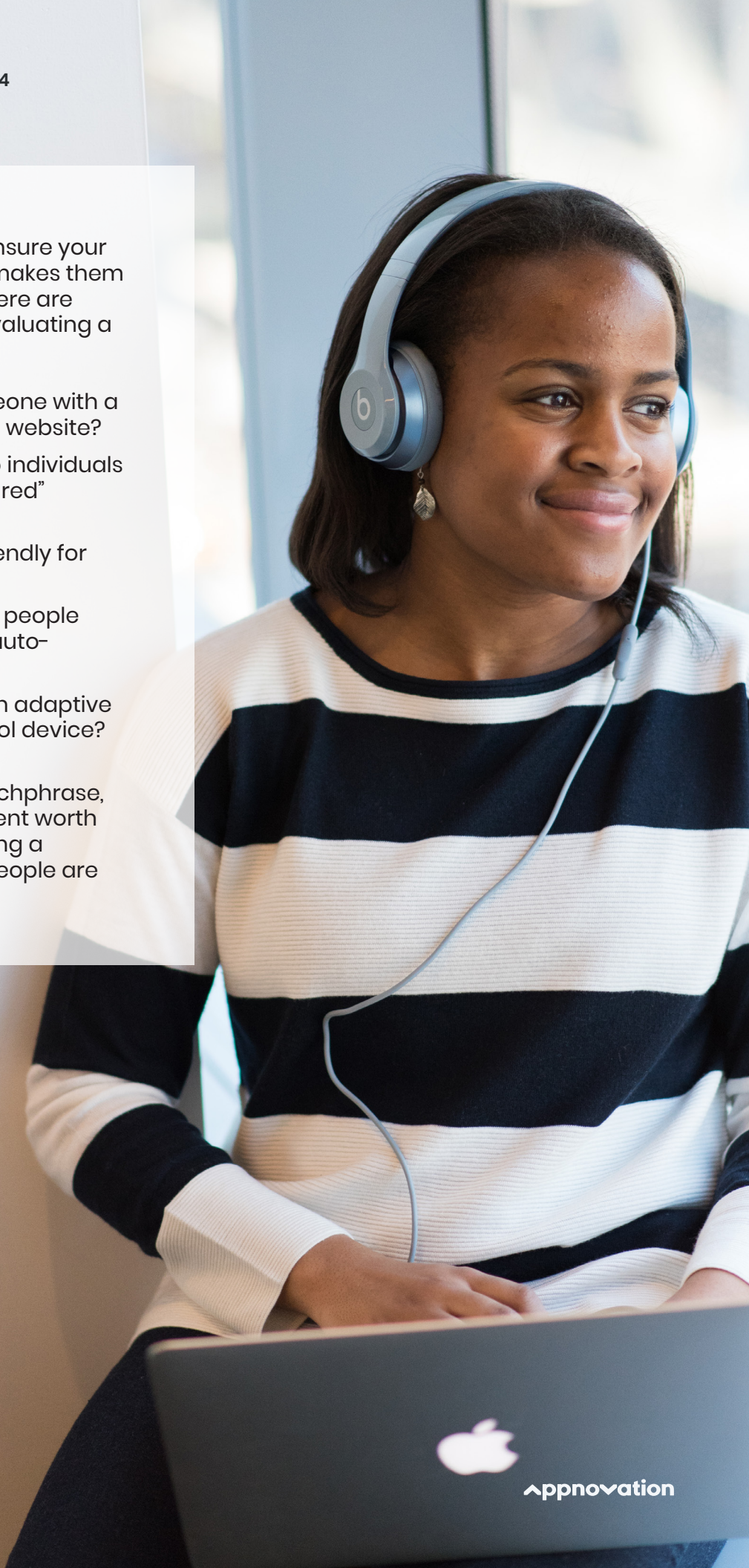
- Credible information about a medical condition
- Details about an insurance policy
- Specs for a new retail product



Enabling accessibility features will ensure your solution satisfies all audiences and makes them feel part of the entire user journey. Here are some questions to consider when evaluating a digital solution's usability:

- How straightforward is it for someone with a disability to apply for a job on the website?
- What language is used to refer to individuals with disabilities, e.g., "vision-impaired" instead of "blind"?
- Are the images and headlines friendly for screen readers?
- Does the solution accommodate people with motor control issues, e.g., is auto-complete enabled?
- Can the solution integrate with an adaptive mouse, keyboard or mouth control device?

Staples may have dropped their catchphrase, "That was easy," but it's still a sentiment worth striving for when it comes to delivering a fulfilling customer experience that people are compelled to share with others.



# Step 10: Provide resilient, **trustworthy** systems

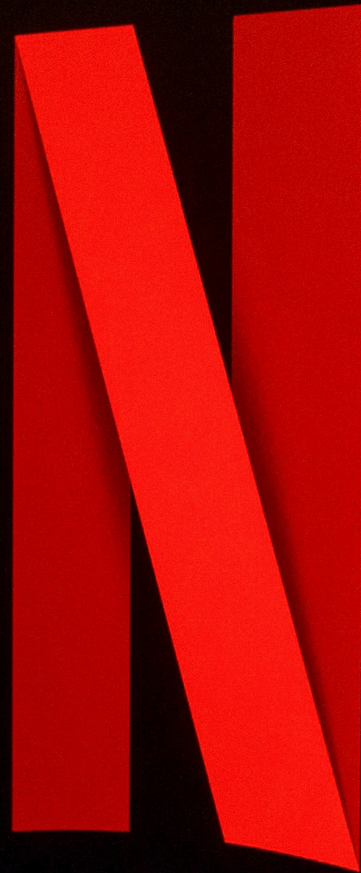
Consistency has long been touted as the bedrock of building customer trust, and nowhere is that more true than with digital solutions. Systems need to work as expected and the best way to accomplish that is with **constant experimentation**.

Companies such as Amazon and Booking.com conduct thousands of experiments each year to determine which experiences result in the highest engagement. For brands willing to try it, they should realize it will require:

- Cultural shifts in leadership and decision-making
- Space for ideas to fail (because most will!)
- Continuous delivery and testing
- Teams empowered to implement quickly

The rewards can be substantial, especially with customer trust, if you're able to show that your systems are dependable and reliable.

Netflix has become renowned for their approach to A/B testing, even building a dedicated platform to help them manage the plethora of tests they're running at any given time. Their dedication covers every aspect of the customer journey, including testing thumbnail images to inspire viewers to watch a particular show.

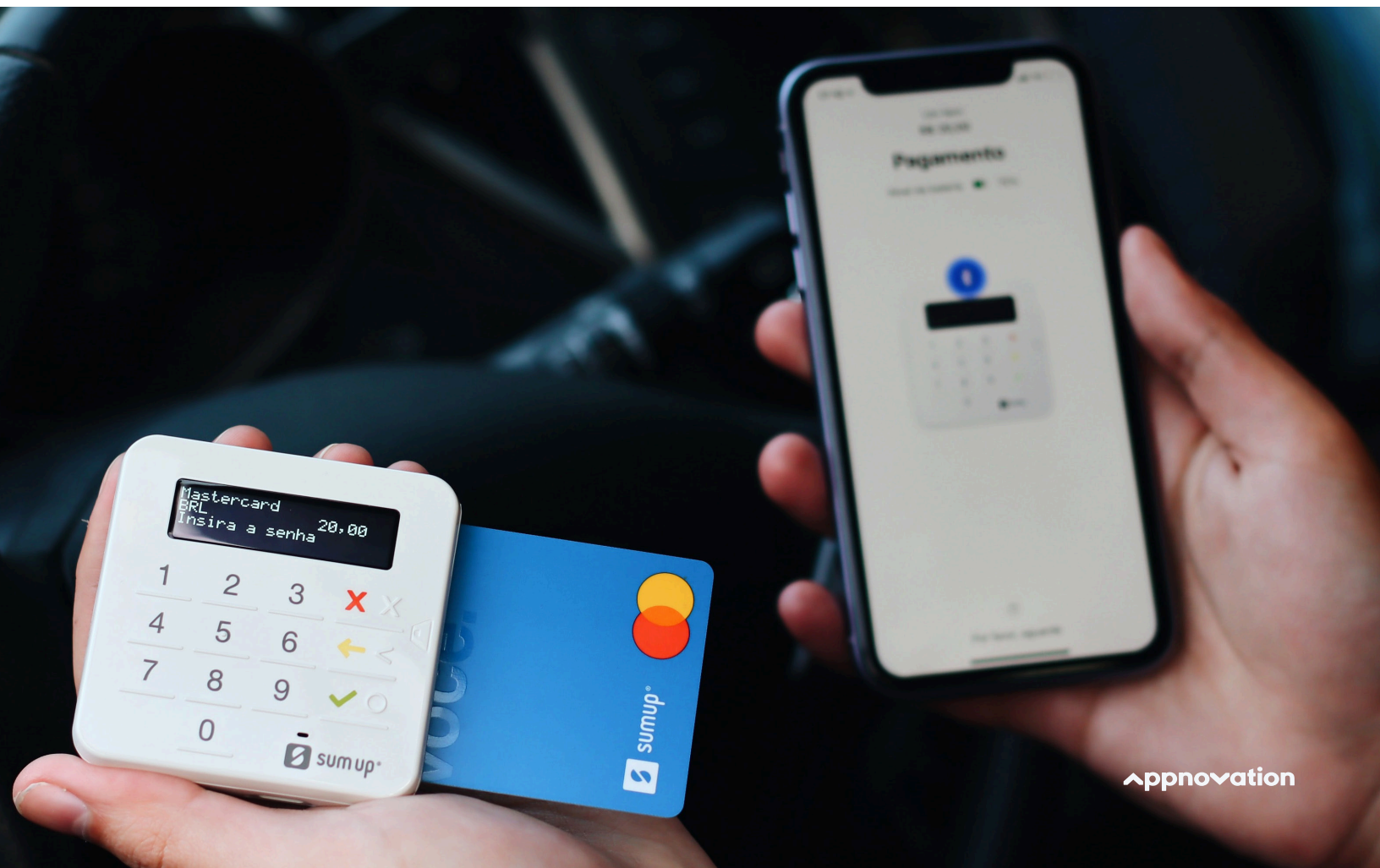


Part of maintaining resilient systems means staying current with adaptive technologies, which can be a feat given how frequently accessibility standards are updated. But it's a worthy pursuit, as accessibility features can extend beyond those dealing with disabilities to also help people, such as some older customers, overcome trust barriers around the internet and digital solutions.

Crownpeak's Digital Quality Management (DQM) platform can check websites against the WCAG and flag deficiencies or coding errors. Accessibility encompasses a lot of nuance so gaps can't be filled with just a quick coding fix. The underlying issues must be explored and tackled directly, which often includes putting governance practices in place.

The British Business Bank was under dual pressure to update their website's digital accessibility when the UK regulatory deadline overlapped with the growing demand for financial content during the pandemic. Crownpeak's DQM platform quickly identified WCAG issues across their expansive site and helped their small team achieve big results in a remarkably short time frame. They reduced the number of issues by 96% overall, with over three-quarters of the improvements occurring within two months, which put the British Business Bank at the forefront of the industry.

For brands able to show that their systems are dependable and reliable for everyone using them, the customer trust rewards can be substantial.



# Wrap Up

The elements explored here all overlap. Empathy enables brands to relate to their customers and helps deliver a sense of satisfaction. Personalization makes the customer feel known, relying on empathetic approaches. Satisfaction fulfills the customer by using personalization techniques to simplify their experience. Values focus decision-making and enhance empathy for the customer. Trust deepens connections with customers and links to personalization through the use of systems and data.

Creating exceptional digital experiences for all customers is no longer an optional venture for brands – it's become imperative. The suggestions presented in this guide will assist in making the effort both manageable and successful.

# Get In Touch

To discuss these ideas further or further explore how to advance your customer experience, don't hesitate to contact us.



[Learn more](#) about the Value Index



[Learn more](#) about DQM



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Appnovation is a global, full-service digital partner that combines bold ambition with practical action to create customer-first digital solutions.

The Crownpeak Digital Experience Platform is truly cloud-native – built for providing scalable and secure, world-class websites and more.