



# CUSTOMER FIRST INITIATIVE DEBRIEF

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June 2018 | GDC Digital Strategy, Consumer Experience Team



# **AGENDA**

**BACKGROUND**

**HEY, HOW ABOUT SERVICE DESIGN?**

**TAKEAWAYS FOR GDC**



**ZEBRA**

# BACKGROUND

# Customer First 3 Phase Approach

“Easier to do business with Zebra” through more customer-centricity

## Phase 1: Collect and Analyze Input

Identify key gaps in the current customer and partner experience

## Phase 2: Identify Improvement Areas

Identify root causes for experience gaps and brainstorm solutions

## Phase 3: Develop Action Plans

Develop action plans for the selected solutions

**CAPTURE QUICK WINS**



HEY...  
HOW ABOUT  
SERVICE DESIGN?

# Service Design Is...

“Service design is a human-centered design approach that places equal value on the **customer experience** and the **business process**, aiming to create quality customer experiences, and seamless service delivery.

Service design **helps organizations see an end-to-end, surface-to-core perspective**, enabling understanding services from a customer perspective.”

From [Practical Service Design](#)

## When Should I Consider a Service Design Approach Instead of My Old Way?

Question	Service Design is appropriate if...	Linear product design may be better if...
Is the problem human-centered?	Deep understanding of the actual people(users) involved is both possible and important.	There are few human being involved in the problem or the solution.
How clearly do you understand the problem itself?	We have a hunch about the problem and/or opportunity, but we need to explore and get agreement.	We understand the problem clearly and we are sure we are solving the right one.
What's the level of uncertainty?	There are many unknowns (large and small), and past data is unlikely to help us.	The past is a good predictor of the future.
What's the degree of complexity?	There are many connecting and interdependent facets of problem; it's hard to know where to start.	The path to solving the problem is clear and analytic methods have succeeded in solving similar problems in the past.
What data is already available to you?	There is very little relevant existing data to analyse.	There are several clear sources of analogous data.
What's your level of curiosity and influence?	I'm excited to explore more and can get a group of people willing to help me.	The problem feels routine to me, and I have to follow existing processes system.

As Featured in Zebra Innovation Design's Service Design Guidebook

Adapted from: *The Designing for Growth Field Book: A Step-by-Step Project Guide,* Jeanne Liedtka, Tim Ogilvie, and Rachel Brozenske

# Why Focus on Journeys?

Best-in-class companies optimize customer journeys, not just touchpoints.

Customers experience companies through end-to-end experiences, not touchpoints

Sales and onboarding



Change to account



Moving/new car



Resolving a problem



Individual touchpoints may perform well even if the overall experience is poor

Touchpoint satisfaction

Agent

Call center

Web

Support

"I want to improve . . ." journey

90%



85%



85%



90%



End-to-end journey satisfaction

60%

# Because Whole Journeys Matter More

## Harvard Business Review

September 2013

### Companies that excel in delivering journeys see faster revenue growth

- Firms performing **1 point** better on a 10-point satisfaction scale have a **revenue growth rate at least 2 percentage points higher** than peers.

### Looking at the whole journey pays off more than fixing one touchpoint

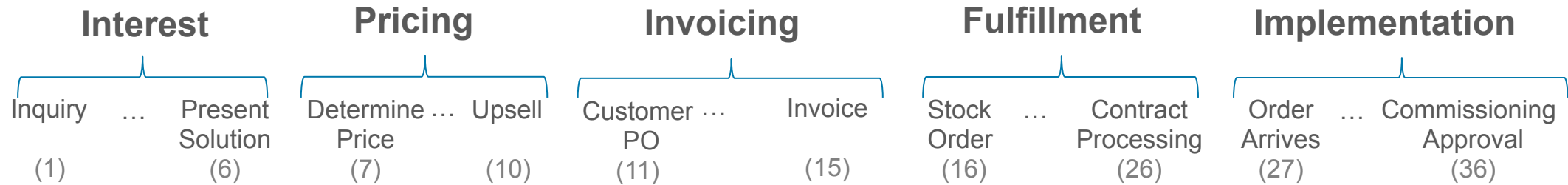
- Performance on journeys is **30% to 40% more strongly correlated** with **customer satisfaction** than performance on specific touchpoints
- Performance on journeys is **20% to 30% more strongly correlated with positive business outcomes** -- high revenue, repeat purchase, low customer churn, and positive word of mouth – than performance of specific touch points



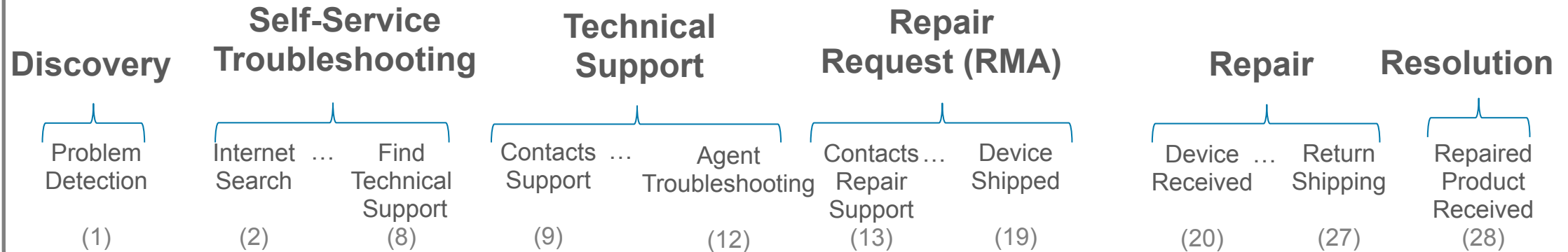
# Our Key Customer Journey Blueprints

Start-to-finish experiences were mapped for a typical sales and support process

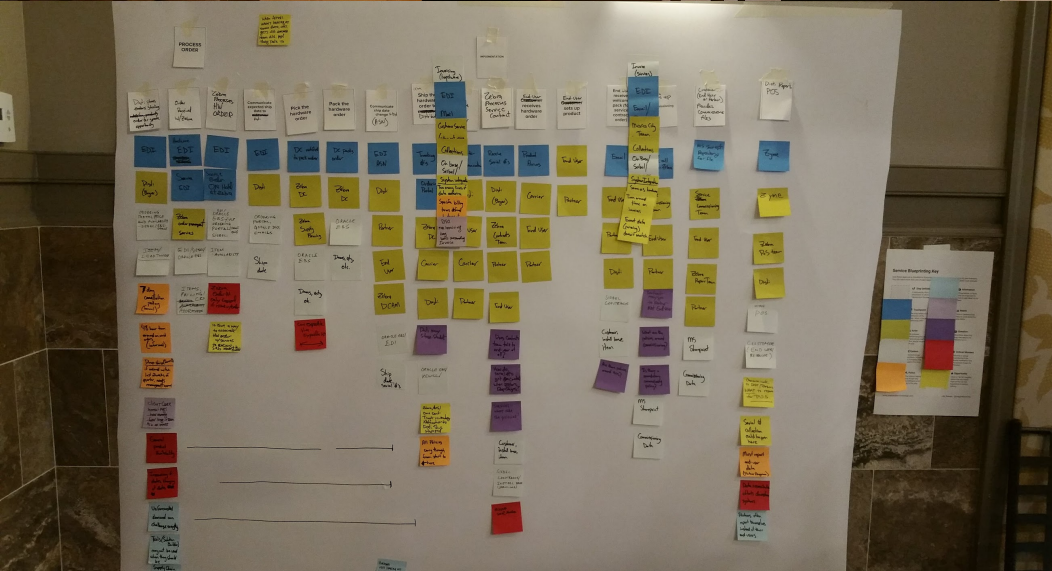
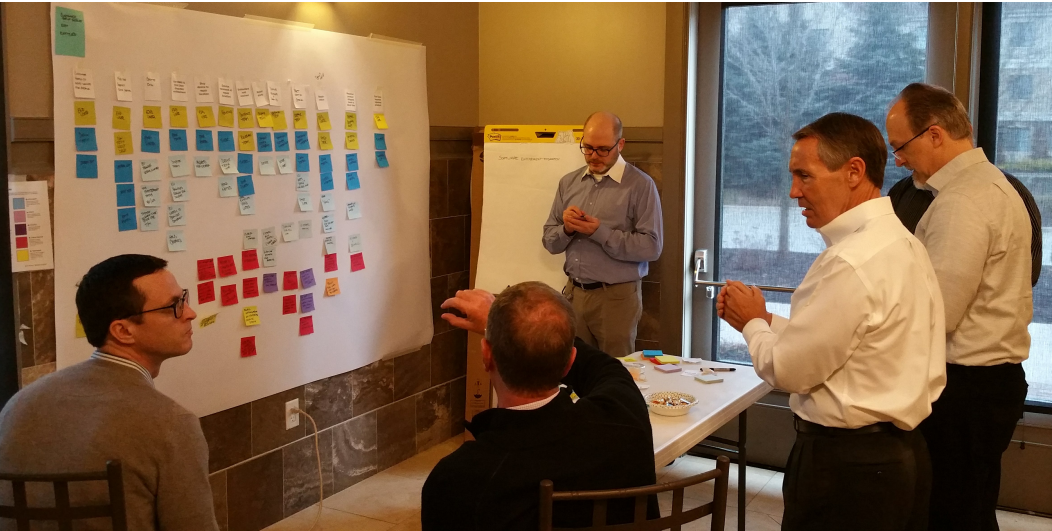
## Sales to Fulfillment (36 steps)



## Product Support (28 steps)



# NA Phase 1, Workshop 1: Building the Blueprints



# Blueprints – Looking at each step of the process

Surface-to-core roles, touchpoints, systems, and policies were mapped for each step

## Customer Requests

### Repair Status

(Step 25)

### Repair Part Problem

(Step 24)

### Repair Completion

(Step 26)

### Legend

Step Description

Touchpoint

Actor

System

Master Data Element

Observation / Fact

Metric / Data Callout

Policy / Rule

Follow-up Question

Critical Moment

Opportunity / Idea

Capture activities

Capture insight

Required replacement part is not in stock

Customer checks repair status via RMA Portal. Repair is on hold for parts.

Repair hold is removed and repair is completed

RMA portal: shows "On Hold" status

End Customer

Siebel Repairs System

Contract / Install Base

System can send proactive email notification of status changes. However, this is defaulted off.

RMA portal only shows "On Hold" status. This limited info often leads to a Non-Tech call. However, there is capability to show **hold type** and **estimated turnaround time**.

Non-tech has processes limiting the info shared with the customer and needs to confirm with repairs that the Siebel data is accurate

Portal does not share a reason for the hold or estimated resolution date. Multiple calls to Zebra is required for this information.

Consider turning on default email notifications

Improve repair data accuracy to provide more visibility and eliminate multiple non-tech calls

Our system provides limited status visibility by inquiry only.

- *By logging into the RMA portal you see your repair is "On Hold" status*

This frequently results in customer calls.

However, the system is capable of providing proactive email notifications with increased visibility.

- *Your receive an email letting you know your repair is on "Part Hold" with an estimated turn around time of ...*

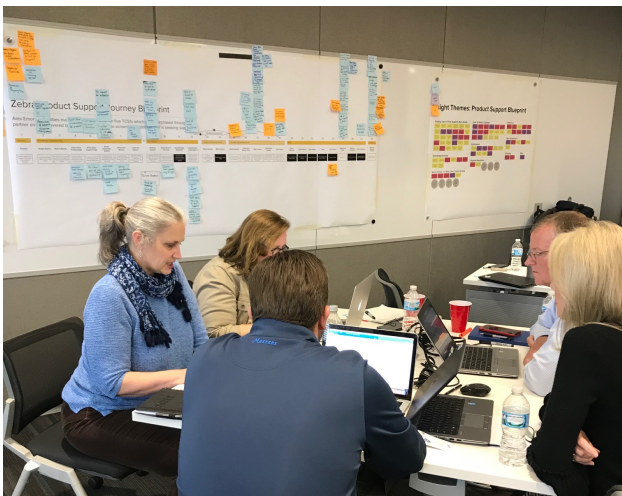




# NA Phase 1, Workshop 2: Defining Journey Gaps

- Primary research conducted
  - Surveyed front-line employees
  - Qualitative interviews with customers and partners
  - Themes aligned with what Workshop 1's blueprints surfaced
- Facilitated workshop activity to map the research themes to the blueprint steps to inform gap statements
  - Gaps will feed into Phase 2, where the team will delve into root causes

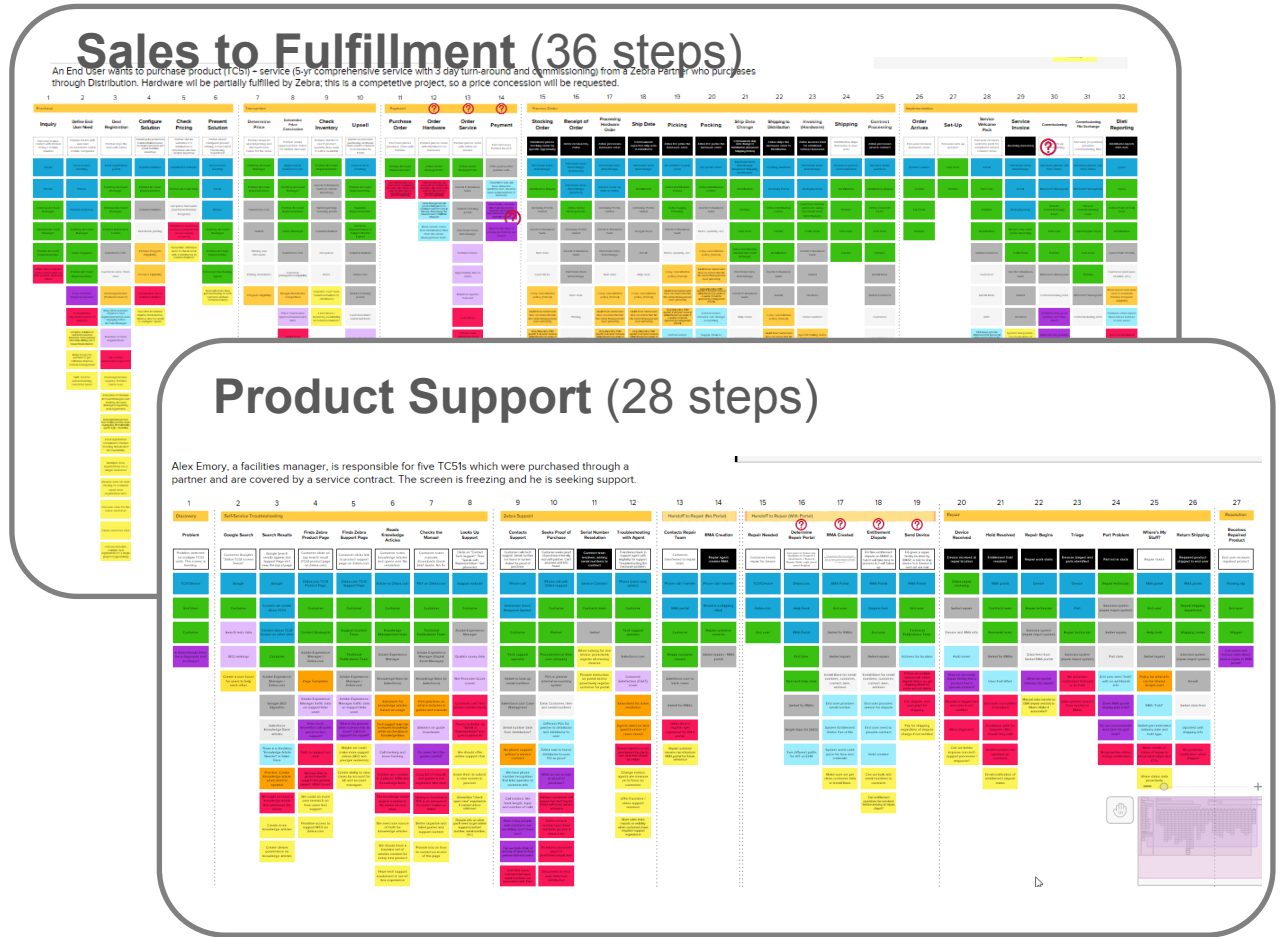
# NA Phase 1, Workshop 2: Defining Journey Gaps



# Align Blueprints with Additional Data

Insights are clustered and evaluated in conjunction with customer feedback to identify gaps.

- Customer Loyalty (NPS) Survey
- Channel Monitor Survey
- Zebra.com Feedback
- Partner Gateway Feedback
- Services Transactional Survey (CSAT)
- Partner Interviews
- Customer Interviews
- Zebra Employee Survey



# Key NA Gaps Identified

Note, these are problem areas identified in the customer and partner data. Further investigation is required to determine root cause and distinguish fact from perception, both of which are relevant.

## Sale to Fulfillment

### Pre-Sale


### Order to Fulfillment


## Post-Sale Support

Entitlement Disputes

## Partner Management


## Culture

Cross-Team Collaboration  
*(Teamwork)*

Responsible and Empowered  
to Achieve Resolution  
*(Accountability)*

Understanding that Internal  
Requests Support Customer &  
Partner Needs *(Integrity)*



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# TAKEAWAYS FOR GDC

# Takeaways

Blueprinting is a useful tool to **develop customer empathy**, fully understand a **process** and uncover **data** that can drive better decisions.

- Blueprinting a journey across departments helps **break down silos**  
*“I really like what we are doing. Truly going through all the different parts of the business and having input from so many different SMEs to create a good plan of resolution.”*
- Blueprinting everything from surface to core **makes the invisible, visible**  
*“Each member of my team gained deeper insight into issues that they may have been only slightly aware of before the exercise.”*
- **We could use it** on our own processes and journeys  
*“I found the blueprint activity to be the most helpful. The discussions were enlightening and the healthy debates were productive.”*

# How Could We Use Blueprinting?

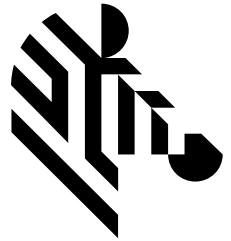
Choose processes and journeys we might want to understand better

## Pre-Sale

- Map a customer who follows a social media link to a gated campaign page for a downloadable asset
- Map the qualifying process for a prospect who fills out a Contact Us form
- What else?

## Internal Customers

- Map the experience of getting a product launched on Z.com (with sales teams and partners as customers)
- Map process of customer trying to download a piece of software
- Map the experience of a business stakeholder trying to get a typical content change on the website
- What else?



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**THANK YOU**

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# APPENDIX

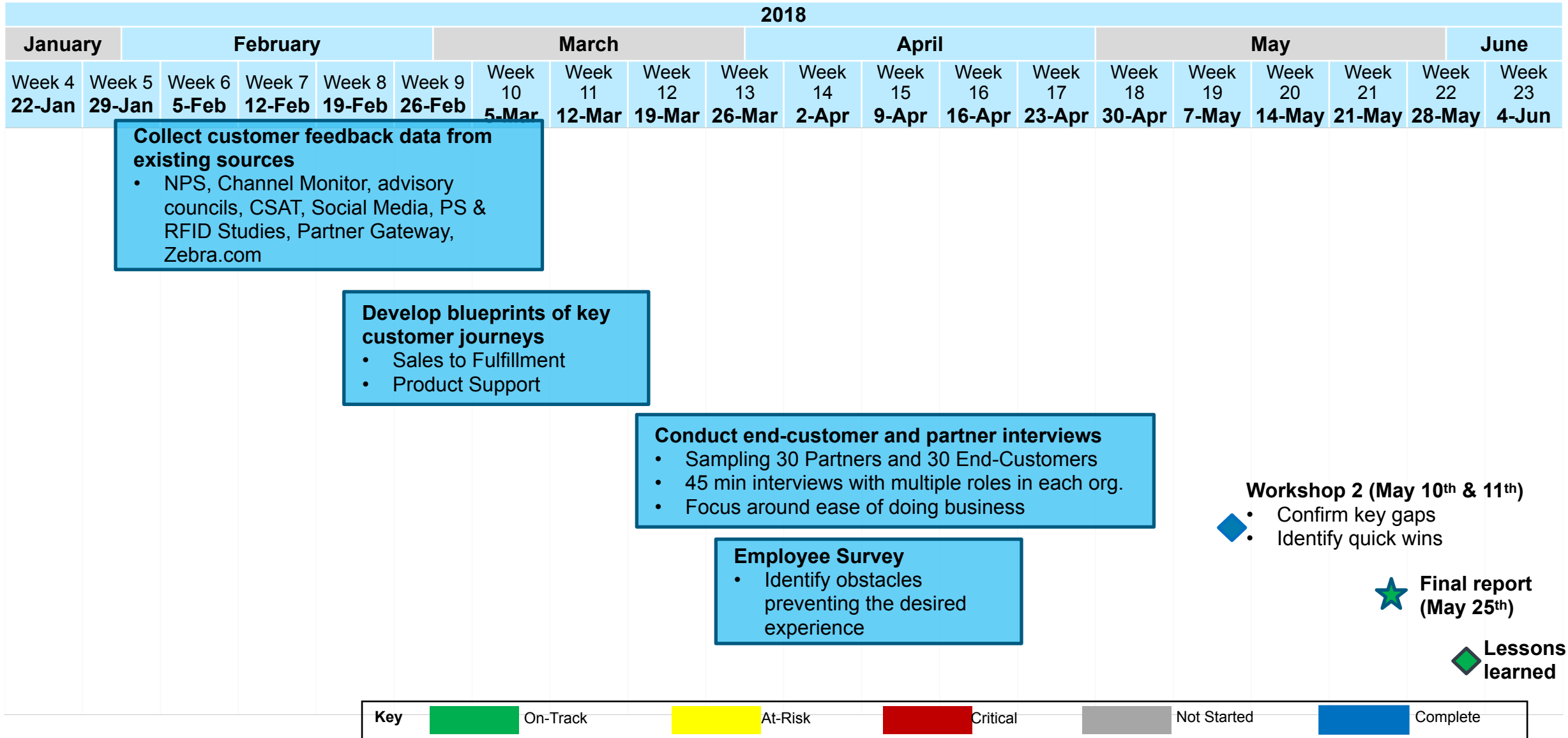


# Customer First – NA Phase 1 Project Team

Name	Job Title	Department
Team Captains	Redacted	Healthcare Leader Sales
	Redacted	Healthcare West Sales Manager Sales
	Redacted	Distribution Sales Manager Sales
Redacted	Global Lead Customer Support Operations	Services
	Senior Director of Information Systems	IT
	Director of Sales	Sales
	Digital Content Manager	Services
	Channel Sales Manager	Sales
	Senior Director of Sales Operations	Sales Operations
	Market Data Analyst	Marketing
	Sr Manager Product Marketing Escalations Specialist	Marketing Services
	Senior Director Business and Market Intelligence	Marketing
	Order Management Supervisor	Operations
	Director of Strategic Planning	Sales
	Senior IP Council	Legal
	Senior Director NA Sales Engineering	Sales
	Senior Manager of Solutions Marketing	Marketing

Name	Job Title	Department
Redacted	Senior Sales Dev	Sales
	Senior Director of Operations	Supply Chain
	Service Designer	Engineering
	Digital Technology Architect	IT
	Consumer Experience Manager, Zebra.com	Marketing
	Director of Talent Development	HR
	Senior Director of Project Management	Finance
	Director of NA CEM Team	Services
	Project Manager	BTO
	Director Customer Support	Services
	Sr. User Experience Researcher	Marketing
	Sr. Content Strategist	Marketing
	Director of Operations	Supply Chain
	Senior Manager of Channel Operations	Sales Operations
	Director of Global Channel Strategy	Marketing
	Senior Director of Service Delivery	Professional Services
	Director of Human Resources	HR
Manager Sales Engineering	Sales	
Sr Administrative Assistant	Administration	
Sr. Content Strategist	Marketing	

# Customer First NA Phase 1 Timeline



## Key Gaps – Pre-Sale Challenges (1 of 2)

<b>Partner &amp; Customer Impacting</b>	<b>Account Manager Transitions</b> Zebra accounts experience management transitions as routine course of business. These transitions require rebuilding the relationship and re-education on the partners' / customers' business operations and needs.
<b>Partner &amp; Customer Impacting</b>	<b>Demo Program Limitations and Confusion</b> Partner can be confused, between Zebra's different demo programs, how to get demo solutions that meet their needs.  Demo depot (loaner program) does not meet the needs of some customers <ul style="list-style-type: none"><li>• Limits on quantity and duration do not allow some customers to qualify products</li><li>• Lack of (device) software demo solutions</li><li>• Lack of availability to meet the demand, especially with newly released products</li></ul>
<b>Partner &amp; Direct Customer Impacting</b>	<b>Configurator Limitations</b> It is challenging to build a comprehensive solution of Zebra's offerings with the tools that are available. Solution Builder currently has the following limitations: <ul style="list-style-type: none"><li>• It has basic catalog functionality, but lacks configurator functionality to guide selling, make recommendations, and build complete solutions</li><li>• It does not include the full Zebra portfolio and lacks details on some offerings</li><li>• It is perceived as slow and difficult to use</li></ul>

## Key Gaps – Pre-Sale Challenges (2 of 2)

<b>Partner Impacting</b>	<p><b>Deal Registration</b></p> <p>Deal Registration is perceived as time consuming to complete and manage. The long turn-around time minimizes the benefit.</p> <ul style="list-style-type: none"> <li>• Form is perceived as too long</li> <li>• Partners are displeased with the time it takes to gain approval</li> <li>• Partners are confused by how approvals are managed</li> <li>• Partners find it time consuming to manage revisions, expirations and extensions</li> </ul>
<b>Partner Impacting</b>	<p><b>Special Pricing</b></p> <p>Obtaining higher level discount Price Concessions is perceived as a long and complex process lacking proactive status updates.</p>
<b>Partner &amp; Customer Impacting</b>	<p><b>Roadmap Visibility</b></p> <p>Zebra does not consistently provide visibility to its products, services, and solutions roadmap which limits resellers' ability to be a trusted advisor with their customer and limits our customers to plan effectively, especially regarding product end of life.</p> <p><i>* Distributors cited readiness gaps in new product launches impacting ramp up</i></p>

## Key Gaps – Order to Fulfillment (1 of 2)

<b>Partner &amp; Customer Impacting</b>	<p><b>Communication Path</b></p> <p>Zebra does not provide clear paths of communication to purchase products or gain status updates. Incorrect Zebra contacts are often unable to assist in getting customers or partners to the correct contacts. Zebra’s contact phone tree (IVR) does not have an option for Order Management (Client Care).</p>
<b>Partner &amp; Customer Impacting</b>	<p><b>Order Status Visibility and Accuracy</b></p> <p>Zebra order statuses can</p> <ul style="list-style-type: none"> <li>• lack stability with initial commit dates             <ul style="list-style-type: none"> <li>• lack accuracy with the provided commit date</li> </ul> </li> <li>• lack tracking visibility / transparency</li> <li>• lack timeliness based on the expectations Zebra set</li> </ul>
<b>Partner &amp; Customer Impacting</b>	<p><b>Shipment Challenges</b></p> <p>Product shipments (not repair shipments)</p> <ul style="list-style-type: none"> <li>• May contain incomplete shipments, inefficiently packed shipments, incorrect products</li> <li>• May contain damaged or defective products</li> <li>• May have contents that do not match the packing slip</li> </ul>

## Key Gaps – Order to Fulfillment (2 of 2)

### Partner & Customer Impacting

#### Contract Purchase Challenges

Zebra support service contract purchases and renewals are perceived as complex and slow to complete. Recent changes to service contract offerings and coverage details may be confusing to customers and partners.

## Key Gaps – Post-Sale Support (1 of 2)

<b>Partner &amp; Customer Impacting</b>	<p><b>Communication Path</b></p> <p>Zebra does not provide clear paths of communication to resolve product issues or gain status updates. Incorrect Zebra contacts are often unable to assist in getting customers or partners to the correct contacts. Gaps may occur in customer or partner call routing (IVR).</p>
<b>Partner &amp; Customer Impacting</b>	<p><b>Knowledge Base Challenges</b></p> <p>Zebra’s self-service knowledge base lacks ease of navigation. Few customers are aware of Zebra’s self service knowledge base.</p>
<b>Partner &amp; Customer Impacting</b>	<p><b>Help Desk Challenges</b></p> <p>Help desk (technical support and repair customer service) agents may have language barriers, may not be able resolve the issue in a timely manner, may lack soft skills, and may not follow up on open cases. Some cases may be closed without resolution.</p>
<b>Partner &amp; Customer Impacting</b>	<p><b>RMA Portal Limitations</b></p> <p>Zebra RMA self-service experience does not provide the value that customers desire.</p> <ul style="list-style-type: none"> <li>• Performance is perceived as slow and unstable.</li> <li>• It is perceived as not user friendly.</li> <li>• It may not provide relevant information.</li> <li>• It does not support Zebra’s full portfolio (AIT is not currently supported).</li> </ul>

## Key Gaps – Post-Sale Support (2 of 2)

<b>Partner &amp; Customer Impacting</b>	<b>Entitlement Disputes</b> Customers and partners may encounter billing disputes on purchased contracts and delayed repair services due to entitlement data integrity
<b>Partner &amp; Customer Impacting</b>	<b>Repair Status Visibility</b> Zebra repair statuses may <ul style="list-style-type: none"> <li>• lack tracking visibility / transparency</li> <li>• lack of proactive notifications of repair holds or delays</li> </ul>
<b>Partner &amp; Customer Impacting</b>	<b>Repair Performance</b> Zebra repairs may not meet expectations <ul style="list-style-type: none"> <li>• Turnaround time for repairs may not meet the expectations Zebra set in service level objectives</li> <li>• Repaired products may not resolve the customer issue</li> <li>• Repaired products may not resolve all product issues</li> <li>• Repaired products may not be configured correctly per the customer contracts</li> <li>• Exchanged products may contain issues</li> <li>• Exchanged products may not be compatible with the customers initial product</li> <li>• Exchanged products may have more wear than the initial product</li> </ul>

## Key Gaps – Partner Management (1 of 2)

<b>Partner Impacting</b>	<b>Understanding How to Win</b> It is difficult for some partners to understand how to be successful in the specializations and the core program
<b>Partner Impacting</b>	<b>Registered Reseller Advancement</b> Registered resellers feel they can't compete in the market due to the PartnerConnect program segmentation which does not allow them to move up in the program
<b>Partner Impacting</b>	<b>Premier Reseller Differentiation</b> Our largest revenue generating Premier partners believe there are too many smaller Premier partners which limits their ability to differentiate themselves to win opportunities
<b>Partner Impacting</b>	<b>ISV Management</b> ISV partners want account management to gain sales opportunities and to coordinate timely product launches in alignment with our roadmaps

## Key Gaps – Partner Management (2 of 2)

<b>Partner Impacting</b>	<b>Lead Value</b> Leads value is often overstated and takes too long to get to the partners (customers have already bought by the time they are contacted)
<b>Partner Impacting</b>	<b>Partner Training</b> Partners want more effective product training to be able to successfully sell our products, but don't believe they need to pay for it

## Key Gaps – Culture

<b>Partner &amp; Customer Impacting</b>	<b>Cross-Team Collaboration (<i>Teamwork</i>)</b> Employees may not be aware of how other teams depend on them. Employees are unclear how they can get support from the teams they depend upon. Currently, lack of processes and role definitions create gaps in the ability to address customer and partner issues with agility.
<b>Partner &amp; Customer Impacting</b>	<b>Responsible and Empowered to Achieve Resolution (<i>Accountability</i>)</b> Employees are aware of the obstacles in providing an improved customer and partner experience. However, they are not aware of their role in the resolution of those obstacles.
<b>Partner &amp; Customer Impacting</b>	<b>Understanding that Internal Requests Support Customer and Partner Needs (<i>Integrity</i>)</b> Under bandwidth constraints, internal requests from other teams may not be addressed with an appropriate sense of urgency. This can delay responses to customer and partner inquiries.

### Zebra Values

**Teamwork** - We are one Zebra. We value team over individual success and capitalize on unique contributions of all in our efforts to better serve our customers.

**Accountability** - We proactively seek solutions and are undaunted by obstacles. We accept responsibility for our decisions, commitments and relationships.

**Integrity** - We do the right thing no matter what. We always act with courage and respect and maintain the highest ethical standards.

# Potential Quick Wins

*\* Initial efforts started to progress these quick wins.*

<b>Sale to Fulfillment</b> (Pre Sale & Order to Fulfillment)	<ul style="list-style-type: none"> <li>• <i>Expand Demo Depot number of devices, duration of use, and accessibility*</i></li> <li>• <i>Deal Registration improvement workshop scheduled for June 5th and 6th*</i></li> <li>• <i>Accelerate phased rollout of Partner Led Price Concessions to additional partners*</i></li> <li>• <i>Lean process evaluation of Dallas DHL DC processes to start in June 2018*</i></li> <li>• <i>Meetings are being held with distributors to address service contract ordering concerns*</i></li> <li>• Audit SFDC to ensure that AM/SE/CAM keep an updated account strategy plan with current projects, goals, and contacts</li> <li>• Develop cadence between Regional Product Managers and Sales SMEs to keep current with roadmap updates</li> </ul>
<b>Post-Sale Support</b>	<ul style="list-style-type: none"> <li>• <i>Pilot automatic notifications in RMA portal*</i></li> <li>• <i>RMA portal functionality enrichment launching October 2018*</i></li> <li>• Create easily accessible contact lists for internal employees and partners</li> <li>• Perform review of “contact us” page and IVR phone system to ensure people can find the right contacts and don’t get misrouted</li> <li>• Grow awareness of the Services Dashboard Tool, which provides repair information updated daily</li> </ul>
<b>Partner Management</b>	<ul style="list-style-type: none"> <li>• Expand SEs Partner Reach Out Program to managed partners</li> <li>• Collaborate with CAM Advisory Board to drive awareness of existing and recently launched partner success tools and determine if there are gaps or additional tools needed</li> <li>• Gather CAM feedback on successes with engaging ISVs and share them throughout Zebra (ex. CAM facilitated Partner Roundtable and ISV Tradeshow, ISVs presenting solutions in internal staff meetings)</li> <li>• Grow awareness of free available partner training on Partner Gateway</li> </ul>
<b>Culture</b>	<ul style="list-style-type: none"> <li>• <i>Onboarding / new hire training updated with customer-centric ease of doing business content*</i></li> <li>• Expand informal cross-team engagements to strengthen understanding and collaboration, such as “brown bag lunches”</li> <li>• Campaign cross-team recognition increases via GEM</li> <li>• Leverage Culture Express to expand dialogue to these gaps</li> </ul>

## Combined EMEA & NA Phase 2 Recommendations

Identify root causes for experience gaps and brainstorm solutions

### Scope / Deliverables

- Determine root causes for the key gaps identified in EMEA and NA phase 1 and propose solutions to address them
- Develop rough order of magnitude (ROM) estimates for execution of the proposed solutions

### Suggested Team Structure

- Organize a single team with 4 main workstreams
  - Sale to Fulfillment
  - Post-Sale Support
  - Partner Management
  - Culture (*Sponsor -*
- Include contacts to represent all regions (NA, EMEA, LATAM, & APAC)
- Note, this will likely be a smaller team than phase 1 with higher % of time allocated



### Timeline

- Target mid August 2018 for prioritized list of all projects
  - Allows for participation in 8/15 IT investment Council and iteration prior to November budget planning cycle

## NA Key Gap Hypotheses Revisited

- **Limited access and availability of education and enablement tools** reduces partners ability to successfully sell the full Zebra portfolio
  - Sales enablement and training → **Refined: Limited feedback on sales enablement. Feedback on aversion to paying for training.**
  - Effective solution configurator  **Confirmed**
  - Marketing collateral and demo unit access → **Refined: Limited feedback on marketing collateral. Confusion and limitations identified with demo solutions.**
- **Management of Zebra order statuses requires significant time and effort** from partners and customers
  - Inconsistent or changing scheduled ship dates (SSD)  **Confirmed**
  - Longer than expected lead times on some products leading to product availability challenges  **Confirmed**
  - Updates to scheduled ship date (SSD) changes do not always trigger automated notifications  **Confirmed**
- **Contract and Repair Service performance** does not meet customer and partner expectation
  - Long repair turnaround time with lack of proactive communication  **Confirmed**
  - Long processing time of services contracts purchased through channel  **Confirmed**
  - Help-Desk lacks access to the data required to respond to customer requests → **Refined: Feedback on helpdesk performance received also includes lack of follow up, premature case closure, and lack of soft skills. Initial hypothesis suggests root cause.**
- **Partners believe Zebra inconsistently enforces policies/governance for PartnerConnect**
  - Online marketplace disruption  **Confirmed: Addressed with recent changes.**
  - Deal registration misalignment with strategic intent → **Refined: Feedback on DR process perceptions of slow approvals and time consuming to manage.**
  - Price concessions negating partner program price differentiation → **Refined: Limited feedback on PC disruptions. Gap identified with management of higher discount PCs.**

# Service Blueprint

Shows Customer Journey + everything needed to make it happen

Can depict existing or future state

**Notice the Following Key Parts:**

Front Stage (visible to user)

Back Stage (usually staff)

Support Processes

Evidence (Tangible touchpoints)

## SERVICE BLUEPRINT *Example (Appliance Retailer)*

