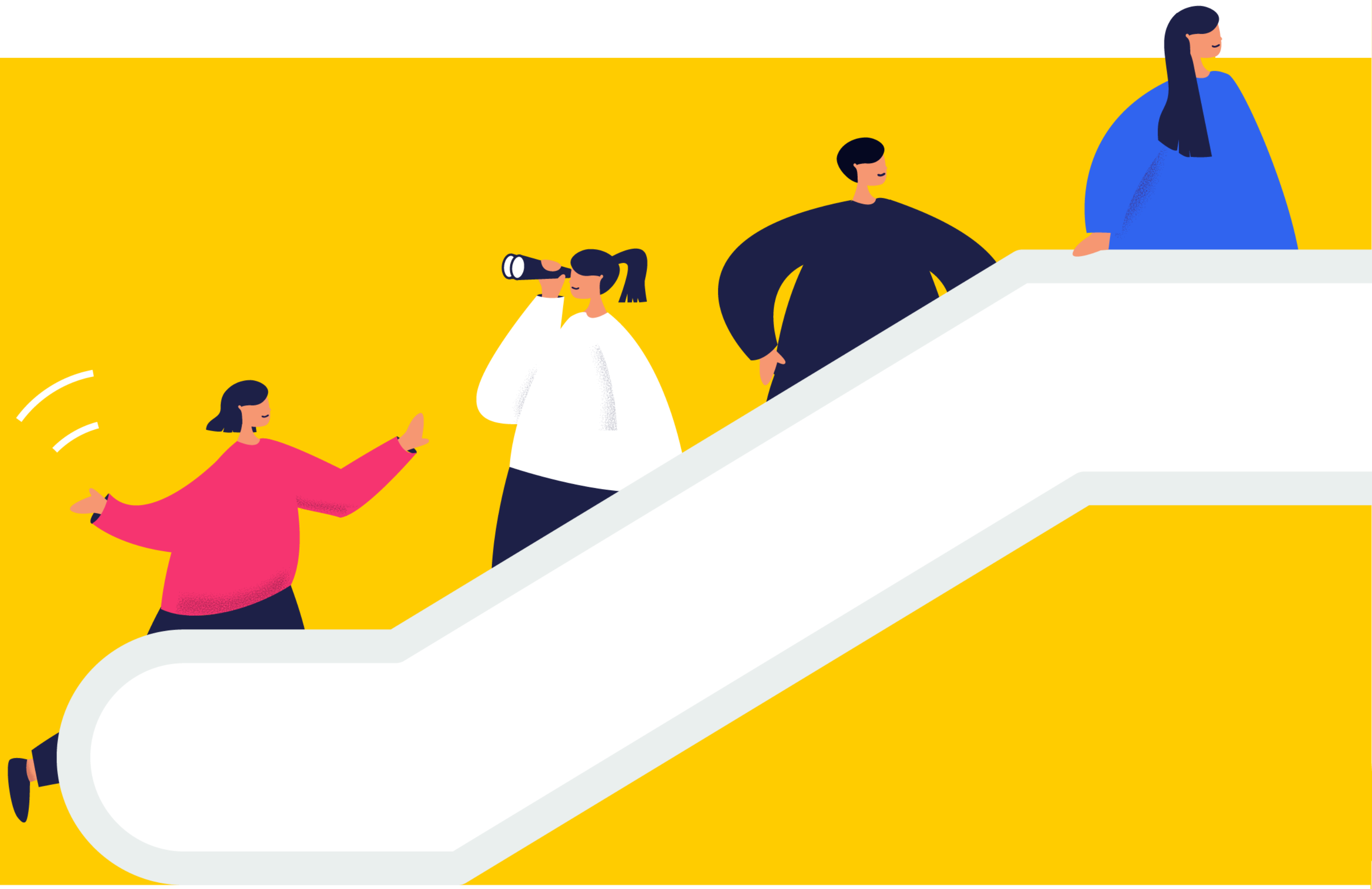
THE CUSTOMER ONBOARDING HANDBOOK

How to Create Experiences That Lead to Improved Long-Term Engagement



CX LEAD

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Foreword

Without customers you don't have a business. Attracting an engaged, loyal customer base is an essential part of building a successful product or service. Yet a lot of companies only focus on short-term engagement—for example, how to get people to sign up—and then just leave it at that.

The average app, however, loses the majority of its users within the first three months, while 80 percent of users say they've deleted an app because they didn't know how to use it.

It's an equally poor picture if you look at the wildly varying conversion rates for customers who have taken out a free trial: many never upgrade to a paid plan.

Making a good first impression is an important step, but truly effective customer onboarding—the process of familiarizing customers with a new interface and highlighting key benefits and features—goes further.

Most onboarding experiences don't really work, even though they can clearly play a key role in increasing customer satisfaction and, ultimately, business growth.

Effective onboarding enables you to appeal to a wider customer base, save money and boost revenue in the long-run, and makes you more flexible to introduce changes to your product or service over time. Real long-term customer engagement is invaluable.

It's therefore crucial to invest more time and consideration into a strategy not only for attracting but also *retaining* customers beyond their first experience with your product or service. The issue is that most organizations put their own product or service first, not their customers, which can cause frustration and risks losing the customer. Only a customer-rather than a product-centric experience will lead to optimized engagement.

So, to help you design a seamless customer experience with longevity in mind from the start, we teamed up with five leading experts from the world of service, experience, and content design as well as user research and usability.

In this book, they cover a variety of actionable techniques that lead to more meaningful, long-term customer engagement, while also highlighting common pitfalls to avoid.

Whatever your role in the customer experience community, there's something for everyone here.

Share the tips and insights outlined in this book with the people you work with—your colleagues, stakeholders, and other teams across your organization—and get them aligned on a consistent, inclusive, and well-researched customer experience. It's the key to a successful business.

The Editor

Oliver Lindberg

Oliver is an independent editor, content consultant, and founder of the Pixel Pioneers events series. Formerly the editor of net magazine, he has been involved with the web design and development industry for more than 15 years and helps businesses across the world create content that connects with their customers.

For more articles on how to build better customer experiences, including interviews with the authors of The Customer Onboarding Handbook, visit:

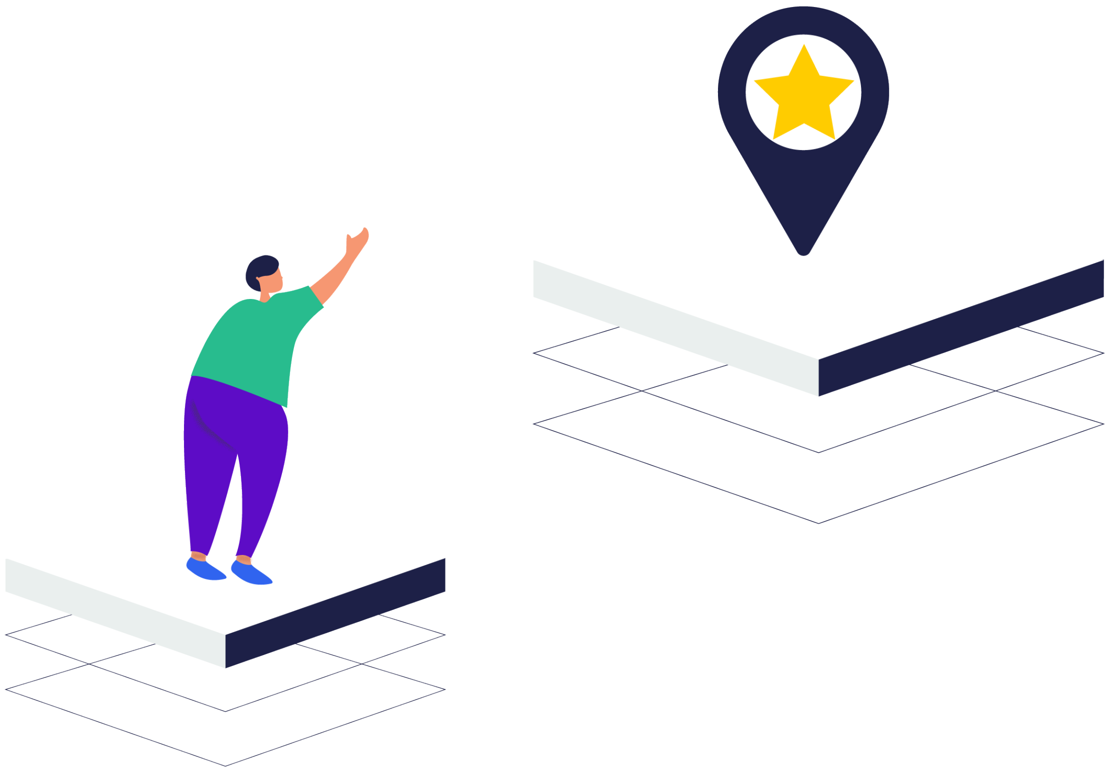
TheCXLead.com

The Brand Experience Gap

*Service design, user research, and brand consultant **Emma Parnell** explains the disconnect between the experience customers expect and what they actually receive—and how to close the gap*

How many times do you use a product or service because you believe in the brand, and then it doesn't live up to its promise?

A bookstore promises personal service and the staff are rude; an airline promotes traveling in comfort but then gives you an inch of legroom... over time, these broken promises erode confidence.



The brand experience gap, as it's called, is not a new concept. It's been discussed before in the context of organizations not delivering on what their customers expect. This is important, especially in a world of ever-increasing consumer expectations.

The trouble is that brands, products, and services are often developed in isolation—by different teams at different times. This isolation can lead to a disconnect for customers. Suddenly, the communication they see and hear from an organization doesn't match what they are experiencing.

Here, I'll dig into how the brand experience gap appears and what you can do to mitigate against it.

How does this misalignment happen?

All organizations have silos. The bigger the organization, the more siloed it tends to be. Marketing will sit in a different department to operations, sales and IT will be separate again.

These silos become focused on optimizing their own functions rather than designing the end-to-end journey of a customer. Teams will often have KPIs that relate to “their part of the journey”. Rarely are team KPIs generated in such a way that they knit together across the whole journey.

As most organizations now deliver a large part of their services via digital channels, an organization’s approach to digital transformation is also key. Often “digital” is approached as a bolt-on. This creates yet another silo, and this silo is focused on optimizing the digital journeys of customers. The problem, however, is that a customer’s end-to-end journey is rarely purely digital.

These silos increase the risk of a disjointed experience for customers, termed by Tim Loo as a “patchwork of interactions”. If we go back to our example of the bookstore, the customer may have been drawn to the store by persuasive social content that promised a personalized experience.

But, if the teams designing and delivering the onboarding training for new joiners are not aware of this message, reality will not live up to the expectation.

So how can you mitigate against misalignment and ensure your brand delivers on its promises?

Prevention is better than the cure

While smaller start-ups won’t have reached the stage of siloed working, the seeds of misalignment are often created in the early days.

The start-up world is very focused on delivering a minimum viable product (MVP) or service that solves a problem and meets user needs. The brand is often neglected as overstretched teams work hard to get a proof of concept realized.

This behavior can sow the seeds of misalignment very early on. Brands tend to be developed quickly, without the required expertise and at a point when a logo is needed. But a brand is so much more than a logo.

If, at this early stage, teams put equal amounts of time and money into developing their brand as they do their MVP, they’d have a much more solid foundation for building a trusted relationship with their customers.

Practical ways to close the gap

While there are tactics you can use to minimize the gap, it all comes back to ensuring a customer-centered approach flows through everything an organization does.

User research and usability testing are becoming increasingly common within more digitally mature organizations. The features and functions of digital products often evolve in agile cycles with frequent iteration based on customer insight.

Equally, marketing campaigns or new packaging designs will be tested in focus groups. Ideas will be tested and iterated on, based on customer feedback.

What is less common is building the brand, proposition, and service together, at the same time, around a shared understanding of what customers really value.

With this in mind, here are a few actions organizations can take to ensure they minimize the brand experience gap.

1. Start with insights rather than ideas

Brands are often created or redesigned based on a mixture of:

- The carving out of a unique and ownable space in the market
- The desires of important stakeholders
- A history or heritage that's important to retain
- Trends or future forecasting

Customers tend to be consulted at the ideas stage. Early visual directions might be tested in focus groups. People might be consulted again once the brand is more developed and visuals of key touchpoints like packaging or signage can be tested with customers to gauge their response.

Organizations rarely build a discovery research phase into brand development like a product team might if they were developing a whole new feature. This is usually due to a combination of a lack of resources and an under-appreciation of the value.

By undertaking in-depth user research with real people, organizations have the opportunity to really understand their customers' behaviors, motivations, and what they truly value.

Ethnographic methods of research are a high investment but can uncover unmet needs that customers are unable to verbally articulate when asked, or needs that simply won't be revealed when customers are presented with a pre-defined idea. Grounding a brand in these deep insights will ensure the core of everything an organization does is based on what its audience really values.

2. Develop a strong vision

When branding is successful, it permeates every aspect of an organization. From the beginning, IKEA's vision is to "create a better everyday life for the many people".

This is reflected in everything they do, from their approach to design and manufacturing processes, right through to the pricing structure and the services they make available at their stores.

A strong vision is essential. When employees live and breathe an organization's vision, it's much more likely there will be synergy between brand and service. Silos will still exist, especially in large organizations, but there will always be a central vision to return to. If this is the starting point for anything from commissioning a new IT system to designing a new product, every silo will have a common starting point.

While internal buy-in is important, an organization's vision needs to resonate with its intended audience. The only way to ensure this happens is to develop it based on a deep understanding of customer's behaviors and motivations.

3. Understand the end-to-end journey of a customer

Often it's the details that organizations trip up on. While developing a customer-centered brand and a strong vision are essential strategic moves, the detailed interactions customers have on a day-to-day basis are just as important.

The only way to understand these details is to map the end-to-end customer journey (more on this in Lauren Isaacson's chapter on customer journey maps). This doesn't mean mapping out what the journey should be or what you think it might be. It means spending time with customers to understand their direct experiences of going from start to finish across all touchpoints.

It's likely your customers will be looking to complete a number of different tasks by using your services. For example, the customer of a bank might want to open a new account and make an international transfer. These are tasks you need to map.

4. Consciously design every touchpoint

Where branding and service design come together is in the execution of every touchpoint a customer comes into contact with when they undertake a task. This might be a social media promotion, an email marketing campaign, a feature on a mobile app, a phone call with a customer service agent, or a physical letter.

Organizations can sometimes get caught up in prioritizing what they see as important touchpoints. This includes making sure a new customer has a great welcome experience when they sign up, or dealing with customer complaints. But it's often the details that get forgotten, like the specific messaging used in text alerts, for example.

Are your customers clear what you're telling them? Have you tested these touchpoints to see if the copy is understood correctly? When something does go wrong, it takes one poor interaction to trigger a cascade of frustration for a customer.

Organizations also neglect offboarding. With the focus usually being on retention, the energy goes into keeping people signed up, in store, etc. Joe Macleod has built a whole business around helping organizations to consciously design endings.

5. Work together

Philip Morton, experience design director at global agency Foolproof, talks about the importance of collaborating and getting buy-in for the brand promise across the business:

> **"If the expectations set by your brand promise are unclear or unachievable, you'll find it difficult to get your experience to match up to it."**

As discussed above, many organizations work in silos. It's likely the team setting the brand promises will be different to the team delivering the services—marketing vs operations if you like. This can result in brand promises that are difficult to deliver on.

To avoid this, brand teams must work more closely with whichever parts of the organization are involved in delivering on these promises. This might lead to a multidisciplinary team being established across finance, HR, operations and several other services, and the impact will be stronger because of this collaboration.

Close the brand experience gap

The brand experience gap is difficult to avoid entirely and every organization will make mistakes. But, by investing in aligning your brand with their service experience, you will be in a much better position to keep the gap small and deliver on your promises.

While looking end-to-end across the whole journey of a customer is important, this can also be daunting. Demonstrating the approach on a discreet, yet important, part of the journey can be a good way to prove the approach.

Take onboarding, this is the first few interactions a customer will have with a company. Get it right here, and you put your company in a great position to have a long-lasting relationship with a customer.

The Author

Emma Parnell

Emma Parnell is a designer with 15 years experience across both brand and service design. After working in both fields she saw an opportunity to bring the two disciplines together and founded her own consultancy, Joy, in 2021.

Emma has experience working on brand projects for organizations like Cadbury and Abel and Cole. In her work as a service designer she worked with organizations like the UK's National Health Service (NHS) and Tesco. Recently, Emma was also on the team that designed the UK's COVID-19 vaccination booking service.

Ongoing Onboarding:

Taking Customers from First Use to Product Mastery

***Chris How**, head of experience design at strategic design consultancy Clearleft, demonstrates how to engage customers beyond the initial encounter with your product or service*

This might come as a surprise to some customer and user experience professionals but nobody wants to learn how to use your product.

What customers want is the outcome of using your product. Be it to make them faster, smarter, or better achieve whatever your product promises.

Consumer-facing products are in competition for a customer's time and attention. These are both highly-prized and finite resources. If the product doesn't demonstrate value early and often, then it won't continue to be used.

This throws up an interesting design challenge; how do you introduce a customer to your product—and all it can do for them—in a manner that is engaging and memorable?

First impressions count, but becoming indispensable requires a design that continues to guide the customer and grow their skills beyond the initial encounter.

Slideshows and whack-a-moles

Overwhelming, off-putting, and obnoxious. This is all too often the reaction to many a product's onboarding experience. The more feature-rich a product, the more it tends to shout about every detail in an increasingly desperate and needy manner.

Poor onboarding comes in some recurring flavors. All are well-meant, but ineffective at engaging the customer and deepening their relationship with a product.

Let's start with overlong walkthroughs of feature after feature after feature. In essence, these are slideshows in disguise that tend to be product-focused rather than customer-centered. With each subsequent panel, the previous ones become a blurred memory.

Then there's the invitation to "take the tour". This often results in the customer playing whack-a-mole to see how quickly they can close the next irrelevant overlay. I've yet to meet anyone who has made it to the end of a long tooltip tour without developing severe banner blindness.

And, of course, there are overlong and out-of-context instructions that, even if found, still prevent a customer from getting to grips with your product: the voluminous instruction manual, ponderous video tutorials, and reams of FAQs (often a tacit admission of content omissions and user interface issues).

How can you avoid these pitfalls and create an intuitive, fulfilling onboarding experience?

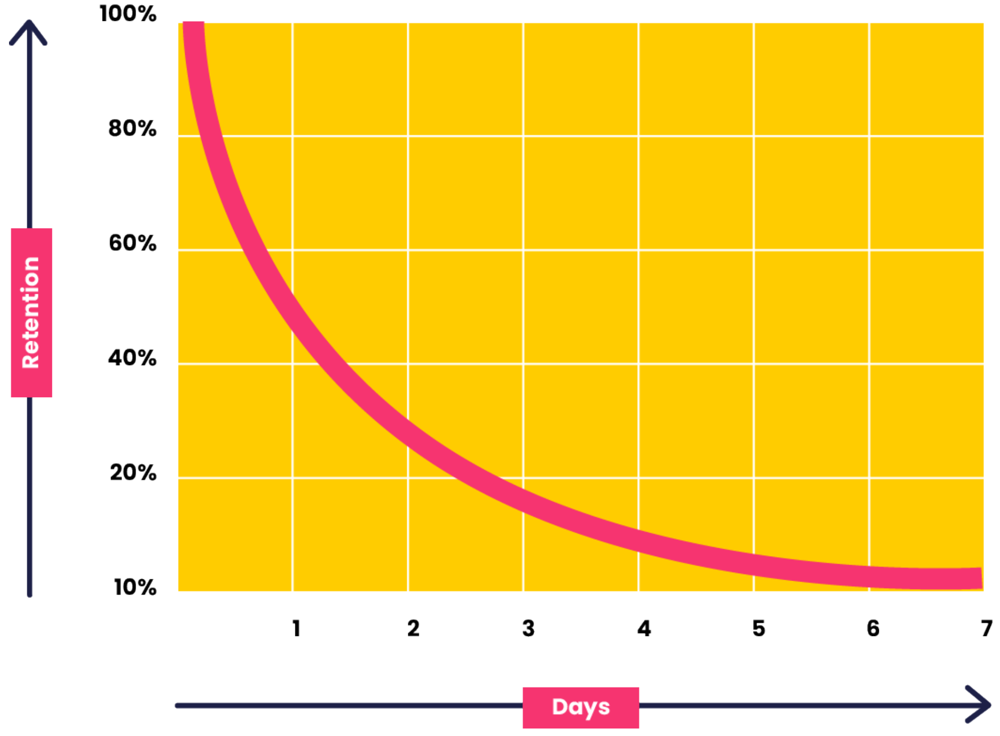
A good starting point is taking a step back to consider how people learn new skills.

Getting going and growing skills

Rushing to take a customer from "Welcome – Let's get started!" to "Congratulations – You're all set!" in a single session doesn't align with how people learn and retain information.

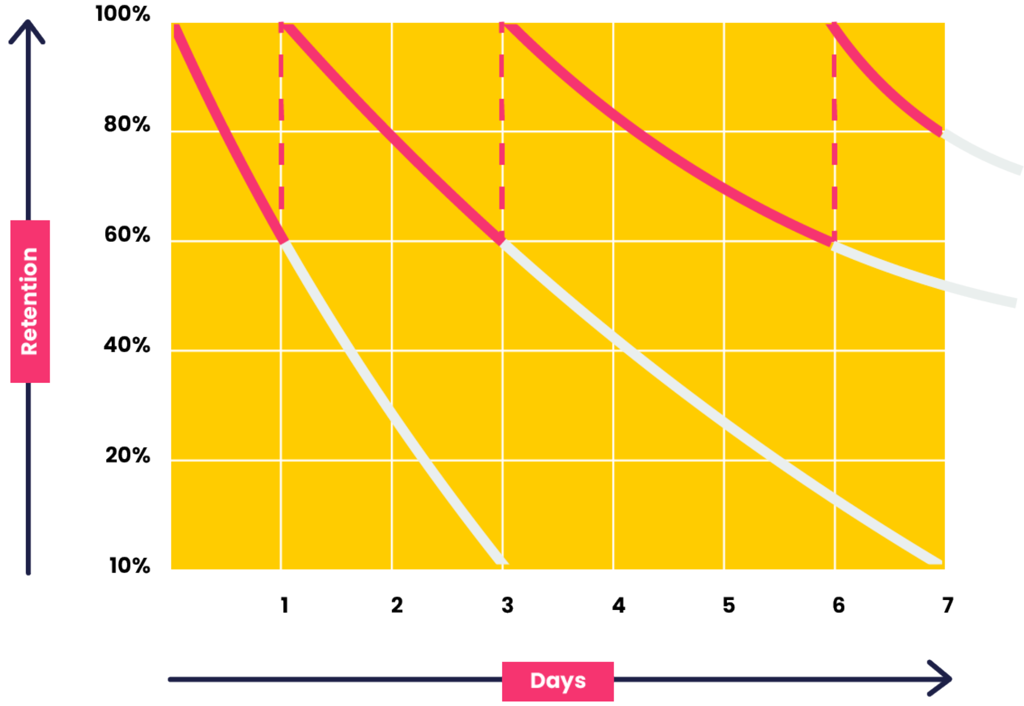
A useful model for understanding how people develop skills, especially ones they're unfamiliar with, is the "forgetting curve" devised by German psychologist Hermann Ebbinghaus.

His studies suggest people quickly lose newly-acquired knowledge unless they actively review and practice what they've learned.



The forgetting curve showing the loss of learned knowledge over time.

To counter this, educational researchers Landauer and Bjork developed a "spaced repetition" method. This means reinforce what you've learned and build on the skills in small increments before introducing new ones.



Spaced repetition to reinforce and retain new knowledge.

So, bearing in mind how we generally learn as humans, successful onboarding is best achieved by designing a longer-term strategy for engagement. Less “one and done” and more providing a series of opportunities for introducing and then building upon skills.

Designing for product exploration and engagement

There’s no one-size-fits-all design pattern for onboarding. To be successful, it has to keep meeting the needs of the customers whilst also feeling authentic for your product.

In designing ongoing onboarding I use a three-step process. I start with casting the messenger, move on to considering context, and end up with creating the messages.

Cast the messenger

How should it feel to get to know your product or service?

It's easier to create a memorable onboarding experience if you know the character and tone of voice for the instructions, tips, and tricks. If you don't define this, your onboarding experience risks quickly becoming inconsistent, mechanical, and bland.

To find the right personality for your onboarding process, begin with the experience and brand words for the product itself. Then develop a pen persona (a sketch of your product guide) to flesh out the characteristics and traits that will make your information both appealing and appropriate.

Consider context

Understanding why, how, and when your product is used will help you to craft the best way to introduce features to upskill your customers.

Four considerations I find useful in setting the scene for onboarding are: the frequency of use, the novelty of features, what's worth learning, and the risks of not getting it right.

Let's briefly look at each in turn and see how they impact the design for your onboarding process.

The frequency of use: A product that is used daily or weekly provides opportunities to drip-feed suggestions for more micro-actions to take. A customer is more inclined to try something new or tweak their settings if the suggestion is relevant to something they do often. If they use a product less frequently, then reminding them of the core features is likely to be of more benefit.

The novelty of features: Features that are both unexpected and useful benefit from being promoted. Listing out and prioritizing what is genuinely noteworthy and unique will help you focus on giving maximum exposure to the biggest potential delighters. List the exceptional, not the expected.

What's worth learning: Thinking about how important a customer considers a task will help you to introduce them to a feature. Users spend longer learning how to master something if they see it as having long-term benefits and value.

Knowing the relative value customers assign to a task will help you to decide if they should be supported through lightweight interaction in the interface or warrant more extensive training materials.

The risks of not getting it right: Users expect and appreciate more guidance when the task at hand carries a higher level of risk. This might come from their inexperience in undertaking the task or the perceived penalty for making a mistake.

For example, filling in a tax return induces anxiety and a need for accuracy in a way that buying a bus ticket via an app on your phone doesn't. Your onboarding should reflect and support the customers' likely emotional state.

Create the messages

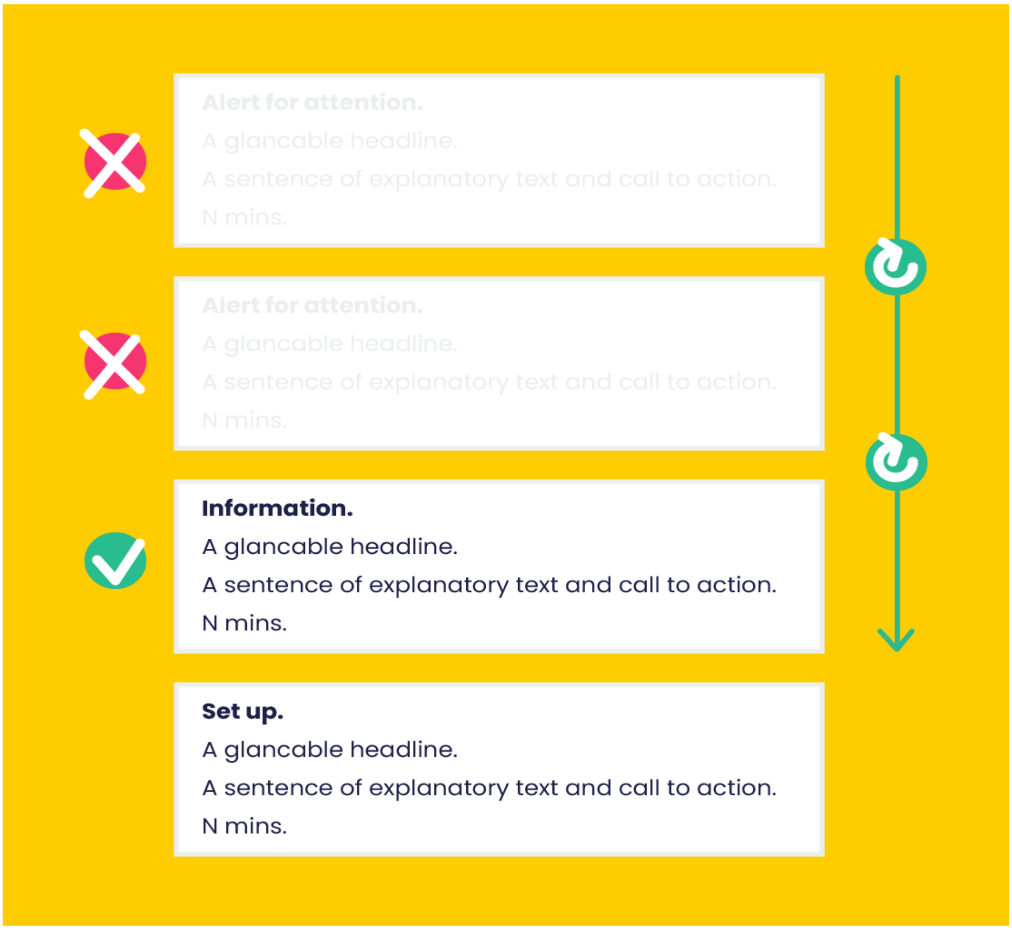
My tool of choice when I start to design the messages for ongoing onboarding is the humble spreadsheet.

On a recent project for a global software-as-a-service product, we were designing the next best actions to suggest to the user. A spreadsheet was the perfect tool to compile the messages, sequence them, and include the conditions needed to trigger their display.

The process to create a message matrix is simple. The power is in having an ordered list of invitations for product discovery connected to the customer's ongoing behaviors and actions.

The message matrix cycles through the list of available prompts and shows the first one that meets the conditions for display.

The messages are ordered from most specific and time-critical at the top of the spreadsheet to more general and introductory at the bottom. This provides a way to offer set-up suggestions from first use and then more tailored nudges to reflect how the product is used.



The flow through a message matrix.

The number of messages will depend on the complexity and feature set of your product. For users to learn as they go, the quality of the features being highlighted trumps the number of nudges. The frequency and relevancy of messages should feel like a friend giving timely advice rather than someone relentlessly nagging with irrelevant suggestions.

The spreadsheet is a prototyping tool to help you explore what to display alongside when and how. It's useful to include the trigger, the message, snooze behavior, and format for your prompts.

The trigger states what conditions need to be true for the message to display. Be precise about the signals to look for. The logic typically includes boolean statements (has something been done), threshold numbers (how often has it been done), and dates (when was it done).

The language and style for messages are shaped by the thinking you've done on the character of the messenger. Adding links for calls to action helps you to see if onboarding is done in situ during a task or if it requires the customers to break from their flow and go elsewhere to carry out the suggested action.

Put users in control of dismissing messages that are not relevant to them. Besides being polite, designing a snooze behavior also provides useful data on the messages that gain instant traction and those that don't. Define how a message gets dismissed, how many visits a message stays on display for, and if and when the message becomes active again.

The message matrix also helps you to design an onboarding experience across multiple touchpoints. Add the location and format for the message to be displayed. This might be microcopy in the interface, promotional banners on named pages, or even tips to include in personalized email newsletters.

Once you have written a number of messages, start to order them. It's then easy to stress test the logic to decide if you have a sequence that both encourages initial discovery of key features and extends the learning with subsequent visits.

The matrix is intended to get you to focus on content and triggers for the delivery of messages. The visual design of the messages is deliberately kept as a separate activity.

Many onboarding messages feel shoehorned into a product. Designing for ongoing onboarding is always more successful when it feels a natural part of the product, giving a friendly nod at the right time to empower and upskill the customer. You're looking to design an invitation rather than be an irritation.

Ongoing onboarding benefits from ongoing iteration

We work in a world of constant change. Products change. The possibilities afforded by technology change. Customers' expectations change. Your onboarding process is a product within a product that will benefit from regular care and attention.

Understanding what's working and what needs adjusting is the cornerstone of product development. Luckily, onboarding processes offer a rich seam for customer insights.

Reviewing usage data is key to identifying what features are used and if your onboarding process was responsible for this. I also like to carry out regular research interviews with new customers to surface humps to adoption, and with long-term users to uncover any unexpected killer feature you're not yet promoting.

Too many fantastic products are let down by an ill-conceived onboarding process.

Incrementally introducing customers to how your product can help them is a proven way to deepen engagement.

A well-designed product deserves a well-designed onboarding process. When you get the combination right, it has the ability to empower your customers, taking them from first use to product mastery.

The Author

Chris How

Chris is the head of experience design at Clearleft, an award-winning strategic digital design agency based in Brighton, UK. He helps clients create meaningful audience-centered digital products and services through design leadership, strategic thinking, and robust research.

He is passionate about using design to improve people's lives and transform organizations for the better. You can read more of Chris' thoughts on creating standout digital products and services on the Clearleft website.

Just Add ICE:

3 Ways to Make Your Customer Experience More Meaningful

*Content design leader **Candi Williams** suggests practical techniques to improve your content and create customer experiences that are more impactful than short-term conversions*

In the world of customer experience, we hear the m-word a lot. *Meaningful engagement, meaningful experiences.*

With choice and competition high, customer loyalty means moving beyond only focusing on the functional. But what does it actually take to create customer experiences that are truly meaningful?

In this article, we'll discuss three vital factors that are often underlooked in the customer experience community.

But first, let's bust the buzzword. According to the Oxford English Dictionary, meaningful is synonymous with *relevant, significant,* and *worthwhile*. For something to have meaning, it needs to hold some value to a person—and that value goes further than just looking slick or being quick.

The focus on words and language here is deliberate. Because words convey meaning. They're a critical component of your customer experience. Content is a light that guides customers through every experience.

If you want meaningful customer experiences, your content has to work for customers. And you can start with the ICE model to help you.

Inclusive

Inclusive customer experiences are no longer a nice-to-have. They're a necessity for businesses—and an expectation from customers.

An **inclusive customer experience** is one that allows equitable access for all customers. The emphasis here is on the word *'all'*. Sometimes it's easy to get caught up with the metrics behind a product. But it's critical to remember that people aren't just a number, and no two customers are the same. Your customers come from all walks of life—they have a wide range of disabilities, identities, backgrounds, and needs.

Creating inclusive customer experiences is a marathon, not a sprint. But here are three things to consider immediately.

1. Reframe how you think about accessibility

Scope's social model of disability states that people are disabled by barriers in society, not their disability or impairment. These barriers can be digital experiences or physical buildings that aren't accessible, or people's attitudes towards disability.

Here are a few examples of barriers to customer experience and how to remove them:

Your website and email newsletters are heavily reliant on imagery and infographics

This is a common issue I see. It means many people with visual impairments can't use, comprehend, and enjoy them. You can help to mitigate this by providing alternative text for all non-decorative images, avoiding text in images, and making sure you're not over-relying on visual imagery.

Remember: Not everyone navigates your website or app by reading and seeing, so information must be accessible to a wide range of assistive technologies.

The only way to communicate with your service is by phone

For people with disabilities related to speech, phone-only customer services are a blocker. Phone calls can also be inaccessible for customers in different timezones, with busy life commitments and those with anxiety.

Make sure you don't create a 'dead end' to customer services by providing alternatives such as live chats, chatbots, or even social media support.

Your social media video reels don't have any captions

Without captions, people who are deaf or hard of hearing get no value from video content. Remove this barrier by making sure all video content has closed captioning. The good news is that there are now lots of auto-captioning functions that do this for you but beware that they're not always accurate, so you may need to do some manual editing.
Once we acknowledge it's barriers that make things harder for people, and not their disability or impairment, we can take control of removing these barriers. This opens up our customer experiences for more people to access, engage with, and enjoy.

2. Embed inclusive language guidelines

Words matter massively when it comes to inclusive customer experiences. There are a number of words and phrases that should be avoided (at all costs) to help make sure customers feel included. Here are some general inclusive language principles:

- **Avoid all colorist language** such as *blacklist* and *whitelist*. Terms like these perpetuate ingrained societal prejudice. Use clearer, more equitable alternatives like *allow-list* and *deny-list.*

- **Make sure your language is gender-inclusive.** Your customer experiences shouldn't bucket people into binary genders of women and men. Make sure you have non-binary gender options and titles (such as Mx). Also, consider where you're using gendered language such as *guys* and opt for more inclusive alternatives like *team* or *all*.

- **Don't use ableist language.** Always avoid using words related to illnesses or disabilities when not talking about those illnesses and disabilities. For example phrases like *insane, crazy, dumb*, or *blind to*. These words can be extremely harmful and shouldn't be used as metaphors.

- **Encourage the use of pronouns.** Pronouns can help people express their identity, show respect, and create an inclusive environment. A tip: Try including yours in your email signature or introducing your pronouns in meetings.

- **Don't assume.** Not everybody has a *significant other* or *parent*, and not everybody celebrates Christmas, so be mindful of this when sending out Mother's Day, Valentine's Day and Christmas content. Giving people a chance to opt-out can have a positive effect on inclusivity.

3. Widen your persona perspectives

The issue with demographic personas is this: Two people could be the same age and live in the same country but have completely different needs, situations, and motivations—just take Donald Trump and Dolly Parton as an example!

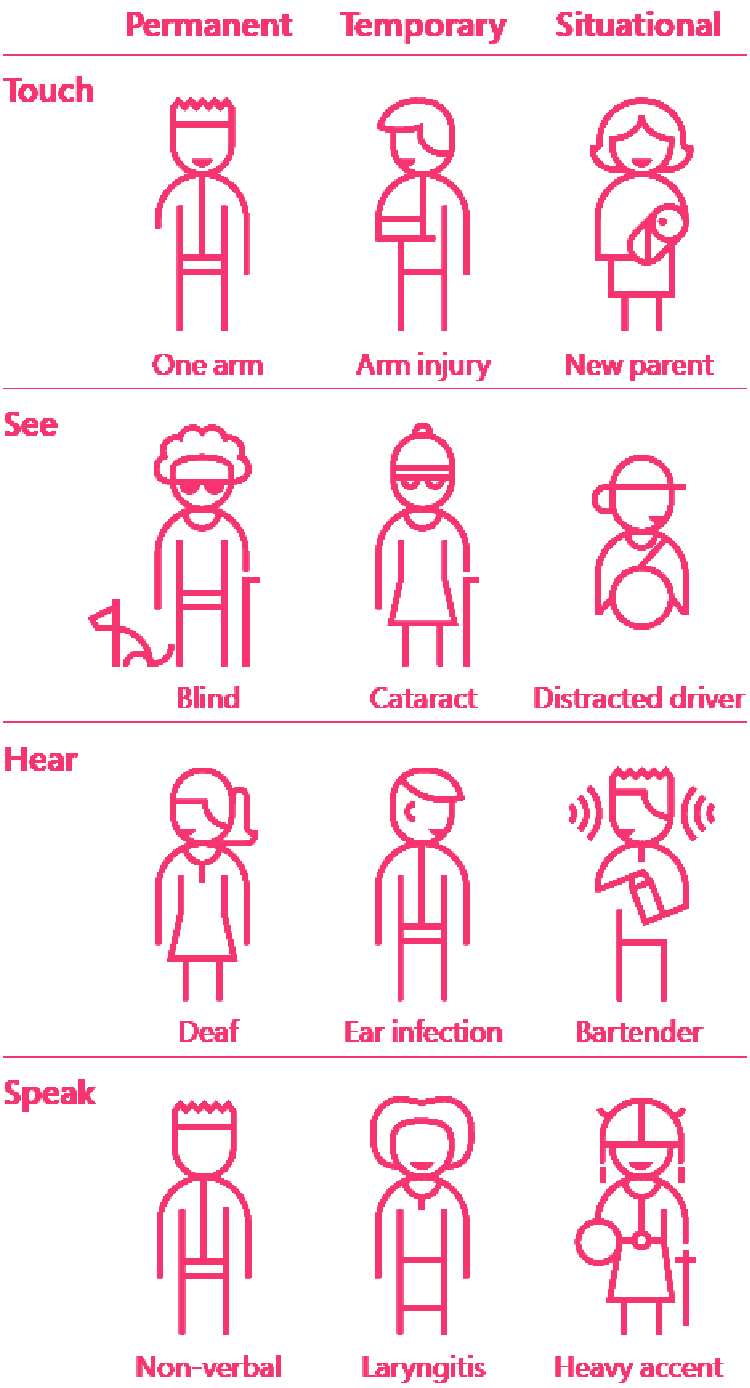
When we're thinking about customers, it's important to continually question preconceptions and the images of customers we have in our heads. Instead, we should seek to understand our customers and the barriers they might be facing.

Some points to consider:

- What permanent, temporary, and situational difficulties might your customers be experiencing, and how might that impact the way they interact? According to Microsoft Inclusive Design, more than **26,000** people face permanent disabilities every year, **13 million** experience temporary disabilities, and **8 million** experience situational impairments. Here are some examples:
    - **Situational:** A new parent who is tired, with a crying baby under their arm, trying to speak to a customer services team
    - **Temporary:** A customer with a broken arm who can't type and is reliant on a screen reader like VoiceOver
    - **Permanent:** A non-verbal customer who has received a letter to call customer services

- Instead of *'How might we create...?'* ask *'How might we improve this for people with situational, temporary, and permanent impairments?'.*

- Look around your team and openly think about whose voices aren't being represented. Cards for Humanity can be a helpful resource in thinking of things from a fresh perspective.



Microsoft Design's Inclusive 101 toolkit uses the Persona Spectrum to understand related mismatches and motivations across a variety of permanent, temporary, and situational scenarios.

Comprehensible

If content is king, comprehension is the kingdom, because if people can't understand something, they can't use it. They can't engage with the experience or return to it.

As part of the customer experience, we tend to produce and deliver lots of content—emails, social media, webpages, letters, and much more. But how much focus is given to ensuring people can actually understand this content?

Here are three simple ways you can get a sense-check on how well your customers will understand your content and experiences:

1. Consider how people consume information

It's really important to remember that people don't read digital content in the same way they do novels. Typically, on websites, apps, and digital experiences, people read in one of two ways:

Skimming: Quickly reviewing content to get a gist of what it's about, but not reading word for word.

An example of skimming is when customers have just received an email from your brand and they're not sure what it entails or what they need to do next. They'll very quickly read over key parts to try and make sense of it.

To help people skim effectively, use cohesive headings, make sure actions (like buttons) are prominent, be clear in the subject line and the first sentence, and keep things concise.

Scanning: Searching for specific information within a piece of content.

An example of when a customer might scan content is when they're looking for how to pay for the items they've added to their basket or trying to find out how long their purchase will take to be delivered.

To help people scan, use clear well-known visual cues (like the basket icon in the right-hand corner for checkout), avoid business jargon and instead opt for phrases people really use (search keywords can be a great indicator of this), and make sure every piece of content serves a clear need for customers.

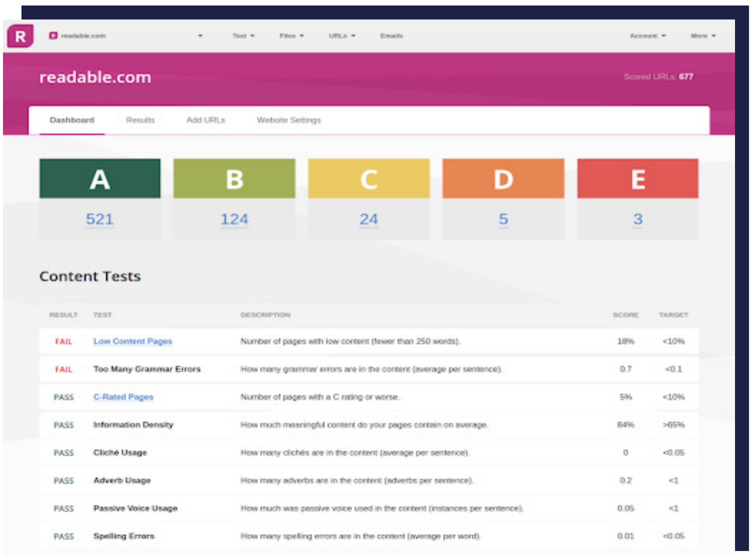
2. Check for readability

Readability focuses on how easy content is to read and understand. It's incredibly important when you consider that the UK average reading age is around nine years (and 12 to 14 years in the US).

Some of the things that contribute to the readability of content are:

- **Complexity:** Try to minimize using any complex words and phrases that might be unfamiliar to your customers. Plainlanguage.gov is a useful resource to help keep wording simple.
- **Sentence length:** Keep your sentences 10 to 15 words long, and no more than 20 words.
- **Structure:** Bullet points and clear headings are your friends when it comes to improving the readability of your content. They allow customers to get a grasp of the key points and navigate content with ease.
- **Typography and fonts:** Use typography that is easy for people to read and understand. It's best to avoid handwritten, scrawly fonts.
- **Active voice and sentence/paragraph structure:** Try to use active over passive voice where possible and front-load the most important points at the beginning of your sentences and paragraphs.

In addition to following these principles, there are lots of methods and tools you can use to assess the overall readability of your content. Free tools like Readable and the WebFX's Readability Test give you a readability score, as well as helpful metrics on your word count and sentence structure.



Readable offers tangible metrics and gives the entire organization something they can gather around.

3. Test for comprehension, not just clicks

An A/B test will only give you an indication of the *what* but not the *why*. If people don't understand the content you're putting out there, you're wasting your time and money.

Thankfully, there are some simple ways you can test your content for comprehension with real customers.

The Cloze test

A Cloze test is a useful way to help you understand if your customers get the gist of your content. It also helps you get to know the terminology your customers use.

Here's how it works:

1. Choose a piece of text that is part of your customers' experience, and replace every sixth word with a blank.

2. Ask a participant (this could be a customer or a willing friend or family member) to read the text and fill in the blanks with what words they think are missing.

3. Count up the number of correctly guessed words. Generally, a score of 60 percent or higher signifies a good level of comprehension. It's a great way of sense-checking any challenging words that people might struggle with and editing these.

The red pen, green pen or highlighter test

Red pen, green pen and highlighter tests can be a helpful way of identifying any sticking points in your brand's content.

Here's how they work:

1. Select a piece of content that's a bit longer, poorly performing, or you have some outstanding questions on its usefulness.

2. Invite participants to mark in green parts that are clear and in red any parts that are confusing. You can also invite them to use just one coloured highlighter to mark any parts of the content that are helpful/confusing/misleading.

3. Repeat with at least three different people.

From this, you'll have a better overview of how customers perceive your content before it goes live and it's too late!

As well as these techniques, you can also use short surveys and tools like the content research prototype to get a sense-check on how well your content is performing.

Emotionally engaging

'Emotional' might not be a word you'd associate with your business or customer experience. But—shock, horror—the truth is people don't make decisions based purely on logic.

In fact, over 95 percent of our decisions and thinking is based on instinct and autopilot. According to the book Thinking, Fast and Slow by psychologist Daniel Kahneman, we have two distinct thinking systems:

System 1 (95 percent): intuitive, rapid, emotional thinking system where we make automatic decisions in a snap-second based on unconscious patterns and beliefs.

System 2 (5 percent): rational, careful, considered thinking where we'll actively seek out new information and gaps in our knowledge.

Because of these thinking systems, how we frame information for customers is especially important.

Let's look at an example:

1. **This yogurt has 0.1 percent fat**

2. **This yogurt has 99.9 percent non-fat**

And another:

1. **It kills 95 percent of germs and viruses**

2. **Only 5 percent of germs and viruses will survive**

Which wording is easier for your brain to comprehend?

In both instances, the first option is a more familiar framing that doesn't make us think as hard. Brands favor them because it allows customers to make a quicker decision.

Our tricky, fast-paced brains love using shortcuts to make sense of things. Very rarely do we weigh up all the options to make purely rational decisions, so it's important to frame your content effectively in your customer experiences.

Here are some tips for doing this:

- **Cut the noise:** As we've discussed, people aren't reading every word of your content (sorry!), so focus on the key points of value that matter to help people make quick decisions.

- **Use search results to frame your customers' language:** Search analytics are a great way of understanding your customers' natural language. Use tools such as Answer the Public to help you frame your content around people's real language and terminology (not jargon they may not understand).

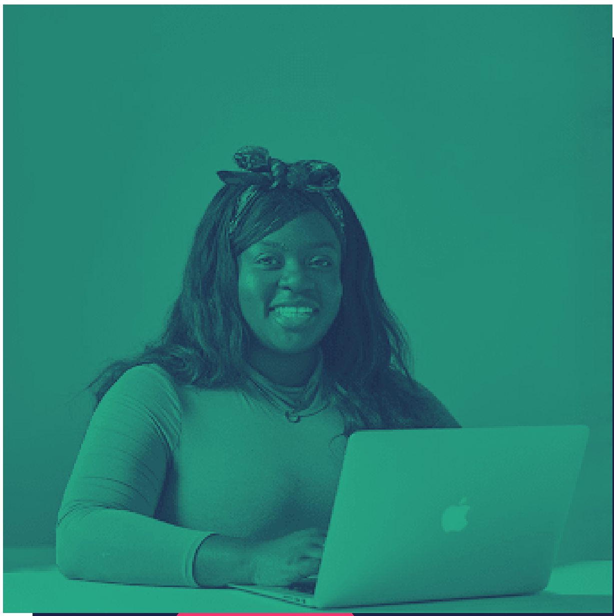
- **Focus on customer benefit:** When making decisions, people want to know what's in it for them, not just a list of features that are often shared with competitors' products and services. So think about: How will it help improve their lives? How is it better than competitors? Hone down to benefits to help entice customers' decision-making.

- **Don't mislead:** Understanding how customers think can help us create more effective content, but we should always use framing techniques ethically. Try to avoid questionable patterns like fake sale prices as customers will see through this and lose trust.

Use ICE to attract more customers for the long term

From website redesigns to new product development, the ICE model principles can be applied to so many different aspects of your customer experience. You can start small too: Why not pick one tip or technique from each section to try out in your work over the coming weeks?

Our customers are our business. So, making their experiences more *inclusive, comprehensible*, and *emotionally engaging* helps you win more customers—and keep them loyal too.



The Author

Candi Williams

Candi Williams is a content design leader, who has been solving complex content challenges and improving customer experiences for over a decade. She has an academic background in language and psychology and language comprehension, and is passionate about the science of language and its role in shaping how people think, feel, and act.

Outside of her day job, Candi is a published author of four books and counting.

Effectively Researching and Using Customer Journey Maps

*Market and user experience research consultant **Lauren Isaacson** outlines the steps you need to go through to better understand your customer's experience with your product or service*

A customer journey map is a visualization of the process that a person goes through in order to accomplish a goal.

For most people, journey maps are great visual resources for grounding oneself in the customer experience. They help set a holistic context. It's not just about that sign-up form you're working on, it's about everything that leads customers to your product or service and, depending on where the endpoint is determined, it could also be everything that comes after a successful sign-up.

But how do you research and create a journey map? And how do you make use of a journey map once it exists?

Personas and journey maps are better together

It may seem strange to start the conversation on researching journey maps by talking about personas, but personas and customer segments are critical to a successful research process.

You don't need to have fully fleshed personas to effectively research a customer journey, but you should have a pretty good idea of the different groups you need to talk to before you start researching.

Take a recent project we worked on, for example. A cloud computing client gave us very little direction in terms of who we needed to recruit for the research on their website revamp. Therefore, we stuck to the obvious and recruited business decision-makers with software development backgrounds to talk to.

The results were stark. They said the messaging was very marketing-oriented, and the research participants said none of it was appealing or helpful. They wanted clear facts about the program. They did not trust promises of customer growth and increased sales.

Then the client asked if the results would have been different if we interviewed people from sales or marketing teams... Yes! The feedback and the journey would probably have been completely different if we'd known to also recruit people from that side of the business. These are the things you want to know *before* you start the research.

Think of personas as a set of lenses to view the journey map through. Say you have a journey map and no personas. That journey map will feel very solid and overly simplistic.

Now think about viewing a journey map through the lens of someone who is very timid and uncertain around technology versus someone who is confident with technology and always has the latest gadgets. Their mindsets, emotional states, and needs will be completely different as they progress to the endpoint.

This is why personas and journey maps are the peanut butter and jelly of the UX world. They belong together.

Who are your customers? How would you categorize them?

This brings us to rule number 1: Know your customers. Your research is only as good as the participants you've recruited and, if you miss a critical user group, then you're getting an incomplete picture of the journey.

Maybe your marketing department has already done a segmentation study and can provide a set of profiles for you to work with. That makes it easier but, remember, the people who buy the product and the people who use the product can be completely different. Keep that in mind when you're relying on marketing segments.

Maybe you need to do your own research to identify personas. Analyze the customer data. Talk to the sales team. Talk to the customer success team. Do some brainstorming to get a starting point of what kinds of people use your product or service. What kind of job titles do they have? How often do they use the product/service? What kinds of companies do they work for?

A lot of assumptions can go into these half-baked groups, so don't stop there. Carry out additional research to test and validate or reject your user group hypotheses.

How to research customer journeys

With the customer groups identified, you can now move on to researching their journeys.

Step 1: Identify the beginning and endpoints of the journey

Research can be expensive and people are complicated. You can't research everyone about everything, so be strategic and roughly define where the journey should begin and end.
For example, if you worked for an airline, maybe the journey would be everything

that happens between considering taking a trip to boarding the plane, but it could also end much earlier with purchasing a ticket.

If you were in enterprise software, the journey could start with identifying an internal need and end with signing a service contract, but it could also end with signing up for a free trial. Neither is wrong. Both are correct.

Determining the beginning and endpoints of the journey is up to you and your team, but making the journey finite helps determine the scope of the research and keeps it focused on what matters.

Step 2: Recruit research participants

Remember: garbage in, garbage out. You want to make sure you're talking with the right people to inform your journey map. Think very specifically about who should participate in your study.

It is unlikely you will have the budget to research every identified persona. This means you will have to prioritize. Think about which personas are the most critical to the success of the journey endpoint and budget to recruit at least three study participants for each selected persona.

- 3 critical persona groups = 9 participants + 1 or 2 extra to round out the study and create a buffer for bad interviews or no-shows.
- A typical qualitative study should consist of about 10 to 12 interviews. Less than that and you risk not interviewing enough people to create a reliable data set.

Write your recruiting screener with questions to help you determine how to categorize your potential research participants to ensure you meet the minimum of three people per persona. Also try to find people who've either gone through the journey recently, are about to go through the journey, or who regularly go through the journey. You want the process to be as fresh in their minds as possible.

Step 3: Select your methodology

There is no one way to research a journey. You have a number of options. A question to ask in methodology selection is which one best primes the memory pump of your participants about the journey.

Often these journeys are experienced, but not really consciously considered. Getting participants who have done the journey recently or are about to undertake the journey will result in more reliable data.
In-depth interviews or one-on-ones

- This standard research methodology works great for journeys people do

regularly but tends to miss in-the-moment insights.
- Surface their memories of the process by spending time discussing participants' goals for the journey: What do they want to get out of it? Why? What other factors are they considering? Who else is involved? What resources are they using?

Homework assignments followed by interviews

- Ask participants to take the journey shortly before the interview and provide in-the-moment evidence of having done so (e.g. videos and photographs).

- Review the homework before the interview and ask participants about interesting moments while you are discussing the subject at hand.

- To ensure people do their homework, pay them an extra incentive for completing it before the interview.

Diary studies with exit interviews

- These are great for situations where you can't be with the participants during the task, like when they're boarding an airplane.

- This is a lot like the homework methodology, but you're usually using a diary app installed on participants' mobile phones allowing them to record their experiences from their points of view.

- Participation in the diary portion is mandatory for receiving the incentive for participating in the study. Do not interview people who have not participated.

- Diary studies allow you to review the incoming materials (survey data, photos, videos, open-ended text answers, etc.) and ask additional questions along the way.

- Base the exit interview on digging deeper into the prescribed tasks of the diary study and the resulting materials.

Ethnographic shop-alongs

- This is really great for journeys that involve being in a physical space, like a store.

- Recruit people who visit the facility being researched regularly and accompany them as they go about a typical task.

- After they're done with their task, you will hopefully have a space inside or outside of the facility to review the experience and co-create the journey map.

Get creative!

- There are very few explicitly wrong ways to conduct research. We all do the best we can with the resources available to us.

- Look at the budget and tools available to you and find ways to get participants to think deeply about their journey experiences.

Step 4: Conduct the research

During the interview, I like to use whiteboards to collaborate with the participant in mapping out their journey. I ask them what their step one is, write it on a virtual or physical sticky note, post it on the board, and then we discuss all of the elements that go along with each step.

- What are they doing at this step?
- What are they thinking about or considering?
- What resources are they using?
- What are they feeling?
- How engaged in the process are they at this point? Is someone else doing this step? Are they waiting for something to happen?
- Is anyone else involved? If yes, how are they involved?
- What is good or bad about this step?

The phrase that pays when it comes to researching journey maps is "And then what happens?" You will find yourself asking this over and over again during your interviews.

Lastly, make sure the participants know the map is malleable. If they think of something else, you can move steps around or change their labels. Give them ample opportunities to edit the map. Nothing is fixed until they are satisfied with the resulting map.

From raw data to journey maps

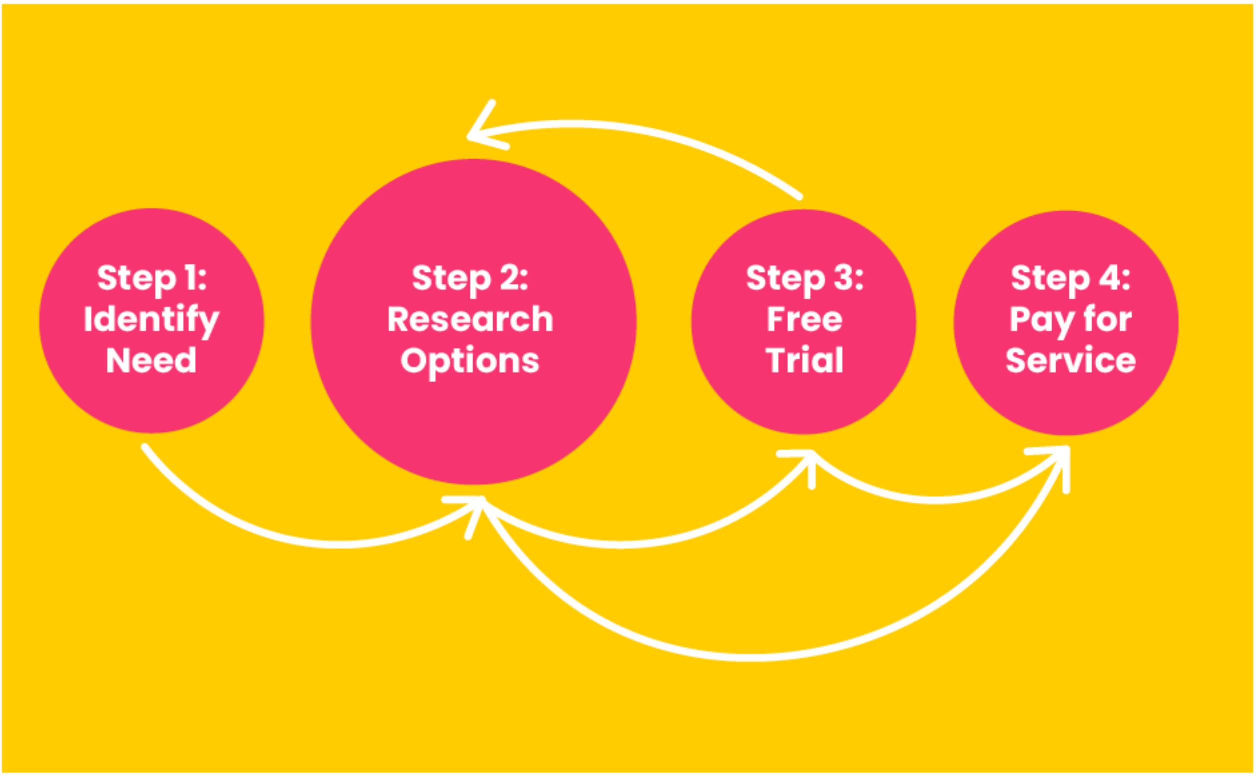
Once you've carried out the research, you will likely end up with 10 or more journey maps. Create a master journey map that is an average of the experiences you mapped, then create derivative maps if there are differences between the journeys of specific persona groups.

You can also take what you learned from the interviews to further flesh out your personas.

While the map can be a simple graphic labeling each step and showing who is involved, the full report should provide tons of color and detail, including everything you learned during the interviews and suggestions for how each step can be improved.

While these maps are typically linear, show where steps are sometimes skipped or repeated. Occasionally people jump back and forth or in and out of their journeys. Make that known.

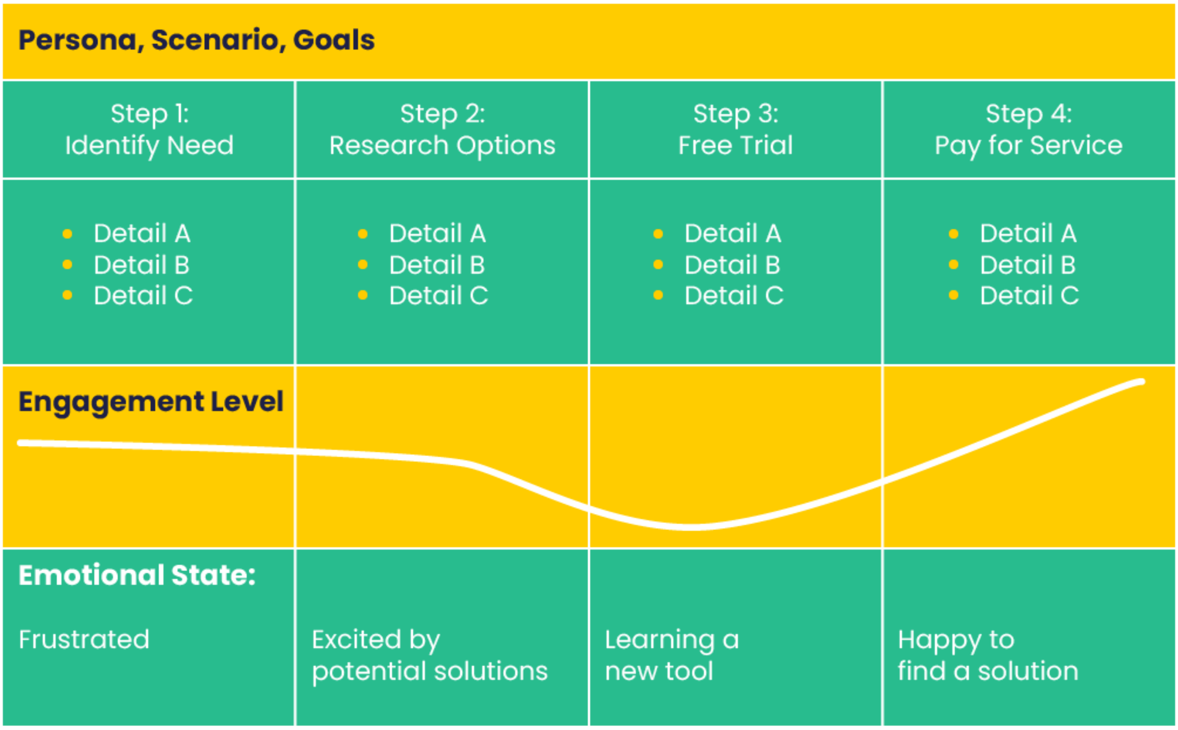
Simple journey map:



Personas involved:

A, B, C	**A, B, C**	**A, C**	**A, B, C**

Detailed journey map:



How to use journey maps

Journey maps and personas are great for asking "How might we...?" questions. Get your team together for a workshop and start analyzing every step through the lens of each persona. Ask how can Step 1 be improved for Persona A with these characteristics?

Then continue asking the same question for the other personas and repeat the process for the subsequent steps. These ideas for improvement can inform an experience roadmap aimed at benefiting both the customer and the organization.

I also recommend referring to journey maps to find critical customer/business interaction points—points in the journey where the customer is highly engaged and interacting with the organization. These can be good opportunities for satisfaction measurement and tracking. It doesn't have to be extensive, just a simple "How are we doing?" type question followed by an open-ended question asking them if they want to elaborate on their answer.

Remember, journey maps and personas are living documents. People change. Circumstances change. The years 2020 and 2021 are prime examples of how journey maps can lose their relevance and require updating. Revisit your artifacts regularly and recognize when they need to be refreshed or require further detail.

With this basic how-to, you should have the direction and tools for better understanding your customers, their experience with your product or service, and how you can improve the process for everyone.

The Author

Lauren Isaacson

Lauren Isaacson is a market and user experience research consultant from Vancouver, British Columbia. Over her career, she has been an in-house research team of one for Motion Canada and TELUS Digital, an interim leader of the market research department of British Columbia's hydroelectric utility, a subcontractor for agencies such as Blink, Chadwick Martin Bailey, and Kalamuna, and a direct consultant for Airtable, Mozilla, and Coast Capital Savings.

Using and Abusing Surveys in Customer Onboarding

*Forms specialist **Caroline Jarrett** discusses the pros and cons of online surveys for customer research and explains how to ask the right questions*

"Let's do a survey".

You want to learn about your customers, so why not run a survey with some questions about who they are and their (onboarding) experience with your product or service? And why not throw in some other questions at the same time, you're doing a survey anyway, right?

Unfortunately, surveys aren't popular with customers, so response rates to surveys are in sharp decline, which limits their value for decision-making.

In this article, I'm going to talk about why a survey can be problematic, how to think about all the questions you ask, some of the benefits of surveys, and then have a look at one specific question that many senior managers seem to be especially keen on: the Net Promoter Score.

Your aims and your customer's aims are not the same

When you're onboarding a new customer, you'll invariably create some tension because your aims and your customer's aims differ somewhat.

If you're operating in a commercial environment, at some point you'll have to create value from your customers. That value may come when customers view paid advertising attached to your service, or because they provide personal data that you can market to someone else, or by converting them from a free or entry-priced account to a heftier commitment in future.

The customer wants to start using your service or product immediately, without any "teething trouble", for free, and forever. Well, maybe for a reasonable cost—but not too much, and definitely not a lot straightaway.

They don't want to spend their valuable time on setup, cookie banners, extra sign-up messages, adverts, or feedback surveys. At this point, they don't know whether they trust you enough to give you their personal data, their credit card number, or really very much at all.

Here, I'm going to focus specifically on how to ask your customers to answer questions. Their answers are valuable to you—but at a cost to the customer.

There are many ways that a clumsy ask can harm the customer relationship or your organization's reputation. So you need to start by getting clear about why you are asking these questions. In other words, establish your goals first.

Know why you are asking every question

Start by indentifying how you will use the answers. For each answer, establish:

- What do you want to know?
- Why do you want to know?
- What decision will you make based on this answer?
- What is the business value of getting that answer at the onboarding stage?
- What happens if you get the wrong answer or no answer?

I've focused on the answer rather than the question because the answer is the data, the valuable information that you can use. One way of getting an answer is, of course, to ask a question—but there are other ways.

For example, you might use an answer that you already have and check with the customer whether it is correct.

The email address we have for you is mickey.mouse@disney.com. Is that still your current address?

- Yes, and it's ok for you use it
- Yes, but I'd prefer you use this one
- No, please use this one instead
- Do not contact me by email
- Something else

Note the 'something else' will probably open a conversation with a customer service person, and the 'do not contact me by email' might be another one that needs careful attention.

But also note that we've kept the customer in contact and on board—we haven't had a breakoff, we haven't lost them.

Sometimes you can collect the answers passively, without directly asking the person. For example, if you want to know what proportion of customers prefer American Express over Mastercard, you can collect that answer without troubling your customers by looking at the returns from each payment provider.

Other answers you want, such as the customer's perception of the value delivered to them by a product or service, you'll have to get by asking them a question. This means you have to think about the business value of each answer in relation to the perceived effort for the customer.

Be clear whether you're asking a form question or a survey question

When you have your clear plans on how you will use the answers, look at them again to decide whether your questions are form questions or survey questions.

A form question gets an answer that you will use specifically for an individual person. Let's think about an email address. The primary value of the email address is likely to be in using it to email the person.

A survey question gets an answer that you will aggregate with all the other answers to get an overall number for a general business decision. For those email addresses, you might create an overall report on how many customers use Gmail or trust you enough to be an email contact.

As another example, if you are asking customers to choose their preferred payment method to take money from them, then that's a form question. If you want to report to your colleagues how many customers are using each method of payment then that's a survey question, which is useful for future planning.

You can see that many questions are both form questions and survey questions. You need to know the exact use—form, survey, or both—for every answer, primarily for privacy reasons. Your Privacy Impact Assessment, your privacy policy, and the promises that you make to your customers during onboarding all depend on those usage questions.

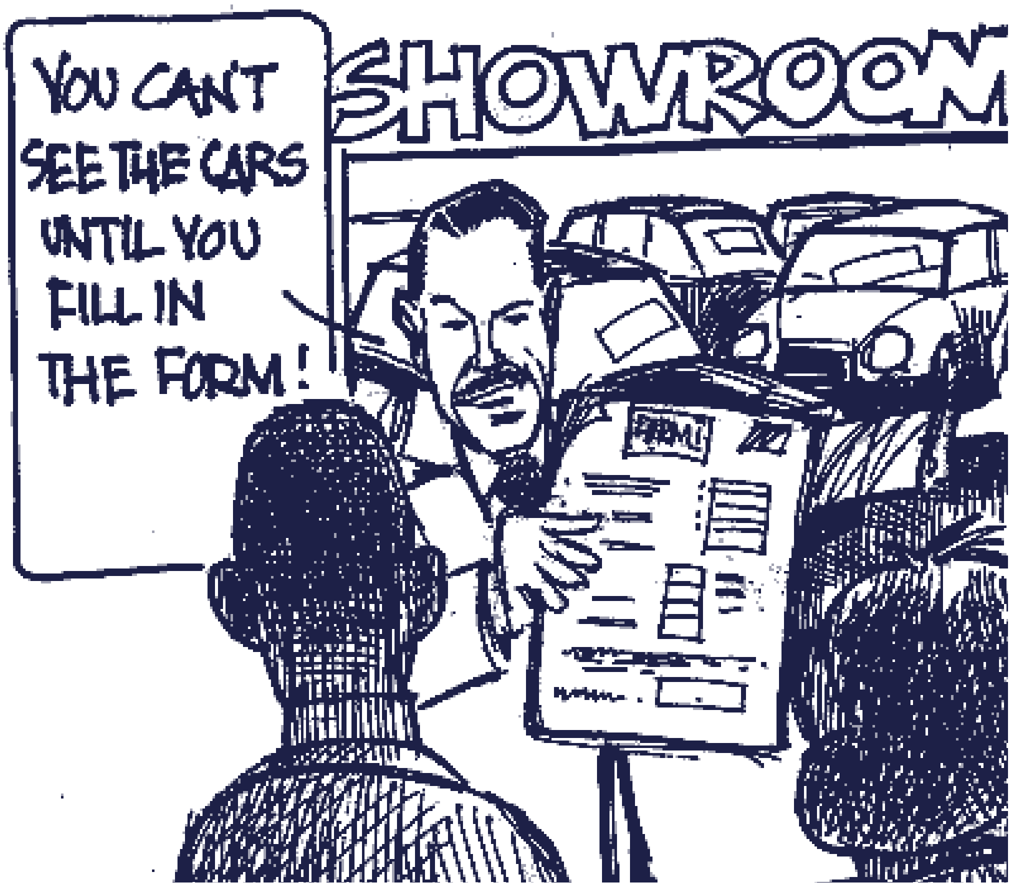
I'm not a lawyer, and I'm definitely not making any legal suggestions here. I can only tell you that I've heard that if the promises, privacy policy, and Privacy Impact Assessment are not exactly in line with each other, then lawyers can get quite agitated.

Every question you ask has a cost

Recently, one service provider asked me "How did you learn about this service?". I had to choose from a massive dropdown menu which meant a lot of reading and then also accurately navigating to my answer.

Every single question you ask is another hurdle for your customer to overcome. That's why my list of 'goals' included the business value of each answer. Is that value really important enough for you to risk asking customers to make the effort?

The disadvantage of a form question is that you must ask every customer—that's the whole point of the question, because you are going to use it specifically for that exact customer. It's got a high cost and needs to have a high value.



Cartoon © Effortmark Limited, used with permission.

Survey questions have a hidden bonus: You can decide to restrict them to a sample of customers, because you are going to aggregate them anyway.

A useful sample can be tiny. If I got a survey invitation tomorrow that said "We've chosen you as one of 100 customers we are asking today, and as a token of our thanks we have added $5 credit to your account" (or given me a free month, or made a similar donation to a worthwhile charity), I'd find that quite compelling.

If everyone answers, that would be $500. Not, in fact, a huge amount to spend on genuinely useful data that will help your organization to make a solid business decision.

When you carefully design the smallest possible sample to meet your goals, you'll reduce the effective cost to customers overall—and you can also afford to be more specific, and more generous, in your incentives which will help to ensure a robust and representative response.

You do not need to ask everyone everything straight away

Let's go back to the point about the business value of getting a specific answer at onboarding.

We'll assume that you've worked hard to postpone survey questions so that you get the customer started without asking anything that isn't absolutely essential.

Well done!

Don't get carried away and make the mistake of sending every customer a survey after every transaction. It's much more effective, in terms of response rates, reputation, trust, and the quality of the results you get, to clearly differentiate between parts of your audience and particular transactions.

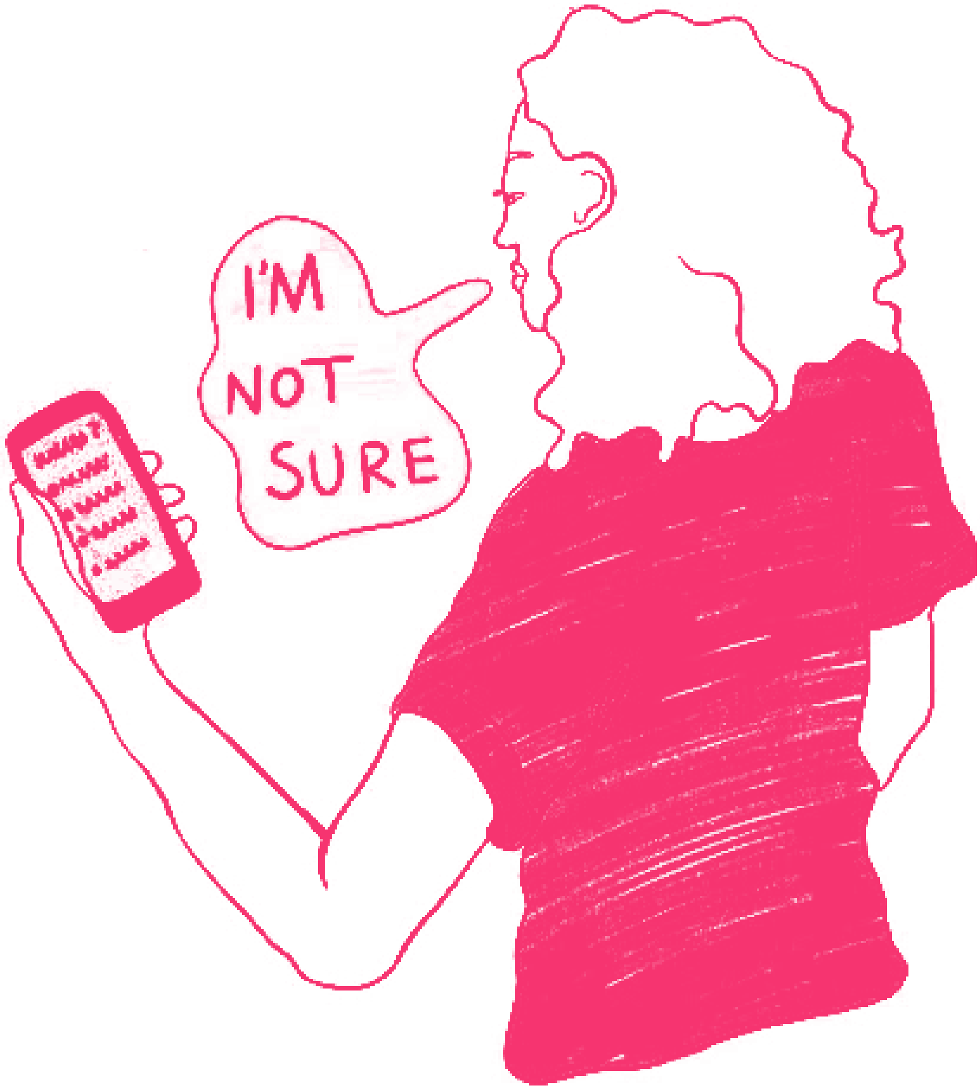
You can then make it clear to those you want to respond that you are only selecting them for highly targeted surveys. Your response rate will be much higher, and the quality of the answers will improve.

One client I worked with wanted to send a questionnaire about their newsletter each time it appeared. I challenged them to consider whether the newsletter survey was the highest value question they really wanted to ask customers, rather than choosing to survey them for data about the services the company was providing. They decided to ask about the newsletter much less frequently.

Find out whether you are asking them a good question by testing them

If you want to ask good questions, then you have to test them with the people you want to answer. And, if your survey is intended for customers during or after providing the service, then you need to test the whole thing, including the survey element. The risk of getting it wrong is that you can really damage your organization's reputation by aggravating customers.

Do some usability testing on your survey questions and get someone to try answering them while you watch. It's the same familiar usability testing process that I'm sure you are using on the rest of your service or product with the emphasis on 'think aloud' so that you can find out whether the questions seem appropriate in context.



Cartoon drawn by Tasia Graham from the book Surveys That Work: A Practical Guide for Designing and Running Better Surveys by Caroline Jarrett.

Then make some changes and test again! One round of testing is immensely better than none, but two rounds of testing (with changes in between) is even better. You'll only be working with five to eight customers each round, and you may be saving dozens, or hundreds, or thousands of customers from getting mysterious or off-putting questions that are hard to answer and that fail to provide the business value you are looking for.

Net Promoter Score surveys have some pitfalls

The Net Promoter Score (NPS) survey question has been heavily touted as the "ultimate question" for measuring customer loyalty. It's the now ubiquitous "would you recommend this product to a friend or colleague?" question. The question is popular with senior executives, but much less popular with customers who see it far too often—and sometimes even in contexts where 'recommend to a friend' seems downright unpleasant, Nobody wants to think about recomending a stay in a hospital to a friend.

% Promoters - % Detractors = NPS (Net Promoter Score)

Net Promoter Score or NPS is a widely used metric for evaluating customer satisfaction. Source: Netpromoter.com.

If you happen to work in the context of a brand where senior management is determined to use NPS, then you'll probably have to ask it.

If you are going to do it, here's some advice:

- Have a coherent plan for how you're delivering the question, who you're delivering it to, and what you're going to do with the results.

- Keep the sample of people you ask as small as possible. You'll be using the answer in aggregate so it's a survey question.

- Plan to ask no more than quarterly—as recommended by the originator of NPS, Fred Reichheld.

- If you're not sure what actions you'll take as a result of your survey, then don't ask at all. I've seen too many bad examples in my survey work: customers bombarded with the question over and over, and results filed away without any action on the organization's behalf.

- Most of all, don't punish your customer service staff, or anyone, on the basis of an NPS survey. That's a recipe for creating awkward and demeaning conversations for your staff and your customers where a staff member feels they have to beg the customer for a top score, and your customer feels bad about being honest.

Ask, but ask carefully

When I set out to write my book Surveys That Work: A Practical Guide for Designing and Running Better Surveys, I admit that I wasn't a fan of surveys. My pitch to publisher Lou Rosenfeld included a chapter called "Let me talk you out of doing a survey".

Over the years, I've changed my mind. I see that survey bonus everywhere: the business value that you can achieve by getting a carefully selected small sample of people to answer a small number of useful, well-tested questions.

So go ahead, ask those survey questions—but ask carefully.

The Author

Caroline Jarrett

Caroline Jarrett is the forms specialist, advising organizations on how to make forms easier to fill in and how to improve websites and business processes that include forms. Her research on topics like "How do people answer questions?" led her to explore survey methodology and to write her book Surveys That Work: A Practical Guide for Designing and Running Better Surveys. Caroline is also co-author of Forms that Work and User Interface Design and Evaluation. Find her on Twitter as @cjforms.

For more articles on how to build better customer experiences, including interviews with the authors of The Customer Onboarding Handbook, visit:

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