Managing the Customer Experience

CARNEGIE-MELLON UNIVERSITY
Heinz College of Public Policy and Management

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Course Description

This course provides participants with an understanding of the principles associated with managing quality, customer and employee engagement. The leadership skills needed to drive customer engagement and loyalty, and develop a culture that focuses on and enhances the customer experience is a key component of the course content. Students will have the opportunity to learn and experiment with the technical and leadership skills associated with managing quality, customer and employee engagement, and to formulate personal approaches to their application in the work environment.

No prior familiarity with the theory or practice of quality management/improvement, customer and employee engagement are required as a prerequisite for this course; students who have been exposed to these principles and practices will benefit from the opportunity to place these experiences into an integrated context.

The course is designed to be intellectually stimulating and professionally useful for students at any phase of their career development.

Course Overview

Although the state of the US economy has changed substantially since 2,000, the thinking behind quality and the customer experience has not. It is no longer good enough to have satisfied customers and employees. Engaged customers and employees and the overall customer experience provide the vital competitive advantage for the US and organizations that survive in the new customer experience environment.

There are three areas of focus for organization change in this course:

Strategy:
- External: focus on the Brand and understands the customer and regulatory environment
- Internal: builds a strategy for culture change and quality and service delivery

Quality and Service Delivery
- Product Quality: exceeds customer expectations and error free
- Service Quality: manages service recovery and is helpful in solving problems

Culture:
- Mission, vision and values
- Customer and Employee Engagement
- Leadership and managing cultural change
Managing the Customer Experience

Participants in this course will have the opportunity, during each week of the semester, to review a theoretical principle behind quality, customer and employee engagement, analyze and apply those principles, and apply methods associated with the design and delivery of an enhanced customer experience.

Students will have the opportunity to test theoretical principles in out-of-class exercises. Brief written reports on these experiences will represent a major contribution to the assessment of student achievement.

Faculty Background

Joseph J. Balestreire is a Senior Vice President and Manager, Retail Bank Quality and Service Delivery at PNC Bank. The Quality and Service Delivery function acts as the principle consulting, education and team management function for the promotion of continuous performance improvement and increased customer and employee engagement and the design of the customer experience within PNC’s Retail Bank.

Mr. Balestreire received his MS in Education from the University of Pittsburgh in 1976. He has over 30 years experience in Management and Organization Development in both Finance and Health Care and eight years teaching in public education. Mr. Balestreire has been a faculty member at the Heinz College for Public Policy and Management since 1994. He is a past examiner for the Pennsylvania Quality Leadership Award and has presented nationally at the Institute for Healthcare Improvement National Forum and at a number of local quality conferences, and has consulted with several Health Care Systems.

Learning Contract

The attached outline reviews the overall approach to the educational dynamic of this course; it is designed to be highly interactive, with substantial student engagement in and out of the classroom.

Learning objectives have been established for each class session; students should be familiar with these expectations, and guide their personal preparation efforts in order to achieve those objectives.

Reading assignments are specified for each class meeting, with the assumption that students will have read the materials and be prepared to critically analyze them in class, as well as to apply the principles in practical exercises. Students are encouraged to contribute suggestions concerning relevant readings during the conduct of the course.
Managing the Customer Experience

Course participants are expected to attend each class; in the event that class attendance is not possible, it is the responsibility of the student to notify the instructor and obtain from other students, lecture notes, discussion materials and handouts from the class.

Course participants are expected to participate constructively in class discussions, contributing to the learning of others through the sharing of relevant insights from professional experience and readings.

The instructor's primary responsibility lies in obtaining and structuring learning materials for the personal growth of each participant. The instructor is also responsible for evaluating each student's progress toward the attainment of the specified learning objectives. This evaluation will be conducted collaborative with the student, with frequent opportunities for constructive feedback on student progress. Primary sources for evaluation of student performance will be written project reports, and the quality of class participation. Grades of A (+/-) will be awarded only for superior performance.

Students are referred to the University policy on cheating and plagiarism. It will be the policy in this course to discourage cheating; in fairness to all, cheating will be treated severely wherever it occurs. Because a large part of the learning experience comes from interaction with peers, students are encouraged to discuss assignments with each other. Materials submitted for grading must, however, be the product of individual effort.

Student Assignments

Discussion Questions

Each week you will be assigned readings in the core texts and articles for the course. You are expected to prepare answers to several discussion questions based on those reading, prior to class. You will use your prepared answers as reference during class discussion and then turn them in at the end of class. Following are guidelines for preparing these answers:

- Prepare clear and succinct answers; use an outline form if you wish, so long as the key concepts are conveyed
- Implement critical thinking; analyze the readings
- Prepare answers on one page only
- Do not use a cover sheet

Required Texts

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<tr>
<td>Buckingham, Coffman:</td>
<td>First Break All The Rules</td>
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Managing the Customer Experience

Required Articles:

Manage Your Human Sigma
Harvard Business Review – Reprint R0507J
John H. Fleming, Curt Coffman, and James K. Harter

Lessons from the Leading Edge of Customer Experience Management
Harvard Business Review Analytic Services
Sponsored by SAS

Primer on Quality
Roberts – Reprint 99509

Getting the Most out of the Employee-Customer Encounter
Gallup Business Journal

Your Employees Don’t Get Your Brand
Gallup Business Journal

The Business Impact of Customer Experience
Forrester Research, Inc.: Maxie Schmidt-Subramanian

Reinvent the Customer Experience
Forrester Research, Inc.: Rick Parrish

Suggested Readings:

ISBN: 0-385-26095-4

Hsieh: Delivering Happiness: A Path to Profits, Passion, and Purpose
ISBN: 978-0-446-56304-8

Blanchard, Bowles: Raving Fans
ISBN: 0-688-12316-3

The Metanoic Organization: Experiments in Organizational Innovation: Senge

Leadership in Metanoic Organizations: Senge
Project Report

During the course, each student will submit an individually developed analysis of the application of a quality, customer or employee engagement techniques in an actual work environment to study and how it applies to improving the overall customer experience. Each student will choose a concept, principle or technique, which has been review in class, and apply it in a real situation in work or school. The project report will have two elements, as describe below. Students are encouraged to identify a technique and a process early in the semester and submit a one-paragraph prospectus by ______ (date).

Final Project Report due _____ (date).
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Report Elements

Descriptive:

- The setting/environment in which the customer experience improvement opportunity takes place
- The analysis (technique(s) and/or process applied
- The process used to introduce and apply the technique
- The outcomes of applying the technique

Analytical:

- How the technique affected customer and/or employee engagement
- The impact the technique or process has on the overall customer experience
- How engagement was enhanced
- What you learned about the technique and/or process and its application

Note: the application of the technique does not have to be successful; if it is not, explain what impeded it effectiveness, and what might have been done to improve it implementation.
## COURSE OUTLINE

<table>
<thead>
<tr>
<th>Session</th>
<th>Lecture Topic</th>
<th>Analytic Skill</th>
<th>Process Technique</th>
<th>Reading</th>
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<tbody>
<tr>
<td>1</td>
<td>Purpose and Content</td>
<td>Understanding the customer experience</td>
<td>Customer Journey Mapping and Root Cause Analysis</td>
<td>Juran: <em>Quality by Design</em> pages 1-115</td>
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<td>Customer experience evolution and trends in management theory</td>
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<td>Course requirements and expectations</td>
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<td>Group Process Process/Multi-voting</td>
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<td>Relationship between Business Processes and the Customer Experience</td>
<td>Key Quality Indicators</td>
<td>Data Analysis: analytic tools (RPB)</td>
<td>Juran: <em>Quality by Design</em> pages 116-217</td>
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<td>3</td>
<td>Understanding Customer and Process Outcomes</td>
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<td>Managing Process and Customer Experience</td>
<td>Leveraging analytic tools to focus on what is driving customer engagement and loyalty</td>
<td>Analytic tools: Pareto Analysis and Scatter Diagrams</td>
<td>Juran: <em>Quality by Design</em> pages 218-298</td>
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5
Lecture Topic: Managing Process Capability
Analytic Skill: Narrowing improvement based on customer key quality indicators
Process Technique: Applied statistics: Histogram and Control Charts
Deming: process outcomes and service quality (Blue Beads)
Reading: Juran: Quality by Design, pages 299-406

Customer Engagement and the Customer Experience

6
Lecture Topic: Delivering Value through the Customer Experience
Analytic Skill: Understand customer expectations
Process Technique: Employee and customer encounter
Reading: HBR Manage Your Human Sigma

Project Prospectus Due:

7
Lecture Topic: Customer and Employee Engagement
Analytic Skill: Ecosystems and employee engagement
Strengths exercise
Reading: HBR: Lessons from the Leading Edge of Customer Experience Management
Suggested Reading: Buckingham, Coffman First Break All The Rules

8
Lecture Topic: Customer Service Excellence
Analytic Skill: Customer Feedback and Taking Action
Process Technique: Creativity Techniques
Reading: Forrester: Reinvent the Customer Experience
Suggested Reading: Blanchard, Bowles Raving Fans
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9
Lecture Topic: The Brand and the Customer Experience
Analytic Skill: Hoshin Planning
Process Technique: Planning Tools: Affinity Diagram, Interrelationship Digraph and Radar Chart
Reading: Gallup Your Employees Don't Get Your Brand
Forrester Business Impact of Customer Experience

Culture and Strategy: Purpose, Brand and Leadership

10/11
Lecture Topic: The Learning Organization
Organizational Values and Behaviors
Analytic Skill: Purpose: Mission, Vision and Values
Process Technique: Deep Dive: Vision and Values Exercises
Force Field Analysis
Reading: Pausch “Last Lecture” YouTube
http://www.youtube.com/watch?v=ji5_MqicxSo

12
Lecture Topic: Surfacing Conflict for Positive Change
Analytic Skill: Attitude toward change
Process Technique: Left Hand Exercise
The Abeline Paradox
Inquiry and Advocacy

Project Due:

13/14
Lecture Topic: Understanding the Organization as a System
Analytic Skill: Systems Thinking tools and templates
Process Technique: Systems templates and case study
Developing System Archetypes

Bringing it all together

15
Lecture Topic: Synthesis/Project Review and Summary
Managing the Customer Experience

Session #1: Purpose and Content
Customer experience evolution and trends in management theory
Course requirements and expectations

Required Reading:
None

Session Objectives:
1. Identify major trends in customer experience management theory.
2. Identify continuities of these trends with customer experience strategies and quality improvement strategies.
3. Identify principles and characteristics of a culture that drives success using the customer experience and quality improvement and its foundation.
4. Understand the value of team/group dynamics, communication and decision-making

Additional References/Resources:
Synergistic Decision-Making

Process Technique:
Group Simulation: Medicine Wheel
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Session #2: The Relationship between Business Processes and Customer Experience

Required Reading:
Juran: Quality by Design, pages 1-115

Study Questions:
1. Differentiate with specific examples among quality planning, quality control and quality improvement. Are these three implemented in your work environment (describe)?
2. How is “field intelligence” applied to the improvement of quality and the customer experience? How can the acquisition of field intelligence be enhanced?

Session Objectives:
1. Defining the relationship between business processes and the customer experience.
2. Identify managements responsibilities in design and implementing customer experience and quality improvement strategies
3. Develop a journey map to illustrate process steps and analyze the cost of poor quality in the customer experience
4. Understanding root cause analysis
5. Identify methods of enhancing interactive participation in small groups

Additional References/Resources:
Samples of process flows and journey maps

Analytical Skills Exercise:
Understand, develop and analyze a journey map and its impact on customer and employee engagement

Process Technique:
Use nominal group process and multi-voting to obtain group consensus
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Session #3: Understanding Customer and Process Outcomes

Required Reading:
Juran: Quality by Design, pages 116-217

Study Questions:
1. Select a problem for the work/academic environment. Select a “level” from the Pyramid of Units of Measure from which you will measure improvement in the process where the problem occurs.
2. Select a specific measure and evaluate this measure in terms of the “Ideal Unit of Measure”. Does it meet the suggested criteria?

Session Objectives:
1. Identify key quality indicators
2. Develop a cause and effect diagram to identify variation in processes and the customer experience
3. Use run, pie and bar charts to visually organize and analyze data
4. Identify methods of arraying and presenting data.

Additional References/Resources:
Samples of cause and effect diagrams and run, pie and bar charts

Analytical Skills Exercise:
1. Review journey map assignment – learning perspective
2. Array a set of data in the most appropriate display
3. Synthesize data analysis with a short fact.

Process Technique:
Complete an opportunity statement regarding the education process at CMU. Apply root cause analysis principles using the 5 why process
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Session #4: Managing Process and Customer Experience

Required Reading:

Roberts: A Primer on Personal Quality
Juran: Quality by Design. Pages 218-298

Study Questions:

1. What methods may be used to measure the capability of a process?
2. Identify error-proofing techniques in actual work/academic processes.
3. What do we mean when we say “capability measures”?
4. Provide examples of dominate variables.

Session Objectives:

1. Apply data collection techniques and analysis to work processes
2. Apply the principles of Pareto analysis in problem identification
3. Develop a scatter diagram using a prepared case study
4. Draw conclusions based on data analysis
5. Identify opportunities for the application of scatter diagrams.

Additional References/Resources:

Sample Pareto charts and Scatter diagrams

Analytical Skills Exercise:

1. Develop a Pareto charts and Scatter diagrams using a prepared case study
2. Draw conclusions based on data analysis – impact on the customer experience
3. Identify opportunities for the application in real work.

Process Technique:

Case studies
Managing the Customer Experience

Session #5: Managing Process Capability

Required Reading:

Juran: Quality by Design. Pages 299 - 406

Study Questions:

1. What is a macro-process and why are they important? Support your answer by providing several examples for your work/academic environment.
2. SQM approach is a top-down model for planning quality improvement. What is your perspective on the value of this approach and its impact on quality, customer and employee engagement?

Session Objectives:

1. Identify the use of the scientific method as the structure for problem solving
2. Integrate the use of several models for structuring a problem-solving process
3. Apply the three strategic questions to analyze improvement efforts
4. Using Histograms to show relationship between similar data elements
5. Apply the theory and control chart techniques to situation data.

Additional References/Resources:

Nolan T. and Batalden, MD: Knowledge for the Leadership of Continual Improvement in Healthcare
Langley, K. Nolan and T. Nolan: Foundation for Improvement (Part 1 and 2)

Analytical Skills Exercise:

1. Use a histograms diagram to show relationships between similar data elements
2. Apply the theory and control chart techniques to situational data and its impact on customer and employee engagement

Process Technique:

Using Deming’s Blue Bead simulation to illustrate how we can bridge data, management and cultural to improve customer and employee engagement.
**Managing the Customer Experience**

**Session #6: Delivering Value through the Customer Experience**

**Required Reading:**

Fleming, Coffman, and Harter: *Manage Your Human Sigma*

**Study Questions:**

1. According to the authors, an infrastructure is needed to holistically manage Human Sigma. In your opinion, what are the key components of this infrastructure and the keys to successful implementation of Human Sigma?
2. What are the advantages and disadvantages of measuring the customer encounter at the local level?

**Session Objectives:**

1. Understanding impact of customer and employee engagement on the organization.
2. Understanding the role of management as it relates to the Human Sigma operating model.

**Additional References/Resources:**

Keifer, Senge: *The Metanoic Organizations: Experiments in Organizational Innovation*
Senge: *Leadership in Metanoic Organizations*

**Analytical Skills Exercise:**

**Process Technique:**
Managing the Customer Experience

Session #7: Customer and Employee Engagement

Required Reading:

HBR Lessons from the Leading Edge of Customer Experience Management

Study Questions:

1. What are some of the best practices that you feel have the most impact on understanding and improving the customer experience?
2. What advantages/disadvantages do you see in tying customer experience to corporate rewards?
3. Why is customer experience “hard” and what challenges need to be addressed in order to be successful in improving the customer experiences?

Project Prospectus Due

Session Objectives:

1. Wisdom from First Break all the Rules
2. The four keys to the “catalyst manager” role
3. Focusing on strengths
4. Rules great managers break

Additional References/Resources:

Buckingham, Coffman: First Break all the Rules

Analytical Skills Exercise:

Dissecting key actions that build and grow employee engagement

Process Technique:

Force Field Analysis: key drivers and barriers to employee engagement
Session #8: Reinventing the Customer Experience

Required Reading:

Forrester, Reinvent the Customer Experience

Study Questions:
1. Describe what is meant by Ecosystem and provide an example from your work or school environment.
2. Forrester research describes the keys to understanding and transforming an organizations ecosystem. Which do you believe are the key drivers of a successful ecosystem and what barriers must be overcome to ensure a successful ecosystem?
3. What are some of the visible signs from a customer perspective that an organization has a functioning ecosystem?

Session Objectives:
1. Ecosystems and the impact on the customer and employee engagement.
2. Leveraging the needs of the primary customer of a product, service or process
3. Design data collection process/methods used in understand customer wants, needs and expectations
4. Use of creativity techniques to identify solutions for improving the customer experience, e.g., decision metrics, paired analysis, etc.

Additional References/Resources:

Ken Blanchard and Sheldon Bowles: Raving Fans

Analytical Skills Exercise:

Applying decision making and creativity techniques to design solutions that will improve the customer experience.

Process Technique:

Explore the use of a force field analysis to determine drivers and barriers to change
Managing the Customer Experience

Session #9: The Brand and the Customer Experience

Required Reading:

Gallup: Your Employees Don’t Get Your Brand
Forrester: Business Impact of Customer Experience

Study Questions:

Session Objectives:
1. Understanding brand alignment in the workplace across industries
2. Leveraging Hoshin Planning techniques as a means to create organizational alignment
3. Use Hoshin Planning tools to define direction and manage implementation across various levels within an organization.

Additional References/Resources:

Michael Brassard: The Memory Jogger Plus+

Analytical Skills Exercise:

Hosni Planning exercise: What are the characteristics of a world class graduate school?

Process Technique:

Exploring the use of Hoshin Planning as a way to improve customer and employee engagement.
Managing the Customer Experience

Session #10/11: The Learning Organization

Assignment: View Randy Pausch “Last Lecture” YouTube video

http://www.youtube.com/watch?v=ji5_MqicxSo

Study Questions:
1. What messages or lessons can be taken from the “Last Lecture”?
2. How can these messages or lessons be applied in your organization, your work, your life, our nation, …?

Session Objectives:
1. Identify the qualities and characteristics of a Learning Organization
2. Identify the role of mission, vision and values in defining organization purpose and alignment
3. Apply the concept of vision to establish the foundation of continuous improvement
4. Understand the impact of values on organizational behavior
5. Apply the for field analysis technique for planning and implementing change

Additional References/Resources:
Joel Barker: The Power of Vision

Analytical Skills Exercise:
Use and apply various models for change.

Process Technique:
Vision Exercises
Values Exercises
Force Field Analysis
Session #12: Surfacing Conflict for Positive Changes

PROJET DUE

Session Objectives:

1. Identify and apply the “ladder of inference” that make up our perceptions and beliefs
2. Surface individual perceptions using the left hand exercise
3. Understand the principles being the “Abeline Paradox”
4. Practice using the principles of Advocacy and Inquiry to resolve conflict

Additional References/Resources:

Jerry Harvey: Harvard Business Review The Abeline Paradox

Analytical Skills Exercise:

• Left Hand Column Exercise
• Inquiry and Advocacy

Process Technique:

• Exploring the use of the “left hand exercise” as a way to surface perceptions

Additional References/Resources:

Senge: The Fifth Discipline
Agris: The Defensive Organization
Boehm: On Dialogue
Session #13 & 14: Systems Thinking

Session Objectives:

1. Identify the elements that comprise the organization as a system
2. Apply system thinking tools and methods using a simulated learning experience
3. Apply system archetypes to school/work related problems

Additional References/Resources:

Senge: The Fifth Discipline
Senge, Kleiner, Roberts, Ross and Smith: The Fifth Discipline Fieldbook
Innovation Associates: System Thinking
Application of system thinking tools and methods: case study, Zorg’s Cave

Analytical Skills Exercise:

Apply of and understand the system thinking tools

Process Technique:

Explore the use of system thinking tools through direct application
Session #15: Synthesis/Project Review and Summary

Session Objectives:

1. Use of team learning as part of completion of project assignments

2. Provide examples of skills and techniques that are most applicable at each stage of the quality improvement process

3. Clarify major questions or concerns regarding the principles and application of quality improvement

4. Recognize achievements by course participants

5. Evaluate the course and identify improvements for future offerings