

# Customer Experience Firestarter

A PRACTICAL GUIDE  
TO IGNITING AND  
MANAGING CUSTOMER-  
CENTRIC CHANGE

**HEALTHCARE**



AT GEMSEEK WE KNOW FROM EXPERIENCE AND BELIEVE THAT THERE ARE **4 INGREDIENTS FOR THE SUCCESS OF EACH CX PROGRAM:**

**1**

**Buy-in from the leadership**

and other key stakeholders - to help secure investments in the CX program and bring the CX program to life

**2**

A technology platform that provides **scalability and standardization** of program, as well as automation of feedback gathering, closing the loop capabilities and objective metrics for customer satisfaction

**3**

A services partner to **ensure speed and efficiency** when adapting the CX program to the dynamic business requirements

**4**

Measurable **business impact** beyond the general agreement that happy customers are more loyal and spend more

It is very often the case that a customer satisfaction management and a push to become more customer-centric come top down. Senior leadership is sincerely convinced in the benefits of customer experience as **a strategic advantage**, but during the adoption phase the program is frequently challenged by executives in different roles and functions across the organization.

Yet, if you need anybody's buy-in, it's the active approval and engagement of the people who talk and work with clients every day. Customer experience management is a great strategic framework, but **people within the organisation are the ones who make it alive**. You may have the vision, the budgets, the technology, but if people don't make it a habit to actively seek out customer feedback and incorporate it in their everyday decisions, you'll never have business impact.

SO, SOONER OR LATER CUSTOMER EXPERIENCE EXECUTIVES FACE THE SAME QUESTIONS:

**How to get C-level buy-in** for CX improvement initiatives?

How to **ensure consistency** of our approach to CX across departments?

How to make sure that all sales managers, account managers and other functions are committed to delivering **great customer experience** and know how to do it?

How to make CX a **priority** for your company?





The bigger topic all of these very questions touch upon is this: **how to scope, ignite, and manage change** within organizations. Translated to the CX domain, this would mean: how to scope, ignite, and manage the evolution towards a truly customer-centric organization. That is, in essence what each of the questions in the beginning addresses: how to do change management well.

We harnessed our experience with B2B CX programs and healthcare companies to adapt two of the most popular change management frameworks – Dan and Chip Heath’s “Switch: How to change things when change is hard” and Jonah Berger’s “The Catalyst”.

# IGNITE A CUSTOMER-CENTRIC TRANSFORMATION IN THE STYLE OF DAN AND CHIP HEATH'S "SWITCH"



The way to get people to start behaving in a new way? The short answer is: appeal to both to both reason and emotion; to System 1 and System 2; to the part of the mind doing the planning and to the one providing the energy; or as Dan and Chip Heath put it, work with both **The Rider (the rational) and The Elephant (the emotional)** side every one of us possesses, and do your best to create the best situation for change to happen and stick.

What is so difficult about it? Well, The Rider is truly great for he provides the direction. Yet, the control he's imposing on The Elephant is exhaustive - self-control, we now know, is a depletable resource. This is what makes change hard - The Rider is fighting a battle against automatic, habitual behaviours, which is one the toughest ones to fight.

SO, CHANGE IS HARD - THAT WE ALL KNEW. HOW CAN WE INCREASE OUR CHANCES OF **CHANGING PEOPLE'S MINDS OR INCITING ACTION** WITHIN OUR ORGANIZATIONS?

**HERE'S DAN AND CHIP HEATH'S DECEITFULLY SIMPLE ANSWER:**

- ▶ **Direct The Rider:** "What looks like resistance is often a lack of clarity. So provide crystal-clear direction."(p. 17)
- ▶ **Motivate the Elephant:** "What looks like laziness is often exhaustion. The Rider can't get his way by force for very long. So it's critical that you engage people's emotional side—get their Elephants on the path and cooperative." (p. 17)
- ▶ **Shape the Path:** "What looks like a people problem is often a situation problem. When you shape the Path, you make change more likely, no matter what's happening with the Rider and Elephant." (p. 18)



**IN OTHER WORDS, TO INCREASE THE ODDS OF A CHANGE HAPPENING, WORK ALONGSIDE THESE THREE DIMENSIONS:**



Make sure that **The Rider** knows where he's going and that he doesn't lose sight of his target



Ensure that **The Elephant** is motivated, thinks he can do it, and knows how to do it



Support these elements by removing any barriers along **the way.**

How does this work in **practice?**

# 1. DIRECT **THE RIDER**

To direct **The Rider's part** of anyone's mind:

**1**

POINT TO THE DIRECTION

**2**

SCRIPT THE CRITICAL MOVES

**3**

FOLLOW THE BRIGHT SPOTS

## POINT IN THE RIGHT DIRECTION

Pointing in the right direction means **establishing a vision, a purpose, or a goal of the journey.** Everything is easier when one knows where they need to go. In CX terms, I've seen this done in two ways. Most of the companies have a CX metric target, no matter if the metric itself is NPS or any other.

The second thing that works well for a lot of companies is a **customer experience intent statement.** This is not something that you will necessarily achieve. Your customer experience intent statement is rather your North Star to follow; the criteria against which you will evaluate all of your decisions related to CX. As Annette Franz puts it in this excellent post, your customer experience intent statement is your answer to this question:

"What do you want customers **to feel** as they interact or transact with your brand?"

## INSPIRATION FOR YOUR CX STATEMENT:



Today's healthcare providers expect commitment on shared performance KPIs. They look for a reliable partner who can aid their business growth, achieve cost-effectiveness and increase interoperability. Hence ultimately improve patient outcome, and provide resources or expertise that has proven clinical, operational and financial benefits. Vendors transform their offerings to supply end-to-end solutions across multiple departments (e.g. Cardiology, Radiology, ICU) and entire facilities. Signing a standard service contract to receive technical and clinical support is no longer enough. Providers need strategic partnerships to create innovative solutions to their occurring problems.

## SCRIPT THE CRITICAL MOVES

The second thing you can do to direct The Rider is to script the critical moves. In the CX world, this is a great advice for anyone working with the people in the front lines to deliver great customer experience. The idea behind it is rather simple - **think in terms of specific behaviors.**

## Example:

Our client, a medical device giant, was running several, often conflicting, CX surveys at different levels within the organization – competitive, transactional and relationship. The results, solutions and initiatives associated with each were often in silos and ineffective.

The company turned to GemSeek in an effort to harmonize and streamline its CX efforts. GemSeek completely restructured the entire CX framework. Our comprehensive process blueprint, the NPS Rulebook, guided our client through all major steps of the new unified global CX program with two supplementary CX surveys.

One focused on the user perspective, the daily interactions, the small inconveniences. The second - on the bigger picture, the relationship, the long-term loyalty. The combination provided both the strategic direction and small steps to take towards it.

## FOLLOW THE BRIGHT SPOTS

The third thing that helps direct The Rider is **finding what already works and replicating it**. As a CX professional, this could mean a number of things. On one hand, you can look for good examples that have been proven to work in other companies and pilot them in your situation.

A very effective practice in this direction is creating success stories to help with the scale up of a CX program.

A client of ours, a large multinational manufacturing company, issues an annual Best Practice Report, where each market shares stories about locally implemented improvement initiatives – what was the specific pain identified and at what touchpoint (sales, ordering, delivery, support, etc.), what was the improvement to solve the particular issue (e.g. introduce digital tracking of deliveries) and what was the impact in terms of financial metrics (e.g. saved a customer, who spends millions each year).

## USING ADVANCED ANALYTICS TO IDENTIFY BRIGHT SPOTS



The tricky part in identifying bright spots is coming up with criteria what exactly constitutes “a success story”. These should be of course the ones that bring the biggest impact – on business KPIs, such as revenue, share of wallet, etc. Even if you are in the beginning phases of setting up your CX program, the earlier you include business impact in your CX setup, the more successful you will be in expanding it. A good practice in this direction is to enrich your satisfaction data with other types of data – financial, sales, CRM, equipment uptime and usage sources – to calculate a single account-level Health Score. Such a metric will allow you to identify high-value, high-satisfaction accounts and adopt the best practices to grow the others, as well.

## 2. MOTIVATE **THE ELEPHANT**

Here are **the three ways** for motivating The Elephant Dan and Chip Heath outline: **go for emotional impact, shrink the change, and cultivate a sense of identity.**

### GO FOR EMOTIONAL IMPACT

A common misconception and one deeply rooted in our minds is that knowledge and information makes people change. These do help but no, they are by no means enough to make a change. **What we need to do if we want people to start acting differently is to find the feeling that can move them.** It may sound a bit cynical, but this feeling can really be anything: from true care about customers, through competitiveness and the will to grow within a company, through envy, to fear that the competitors will get an edge, to wanting to put a successful project on a CV.

### SHRINK THE CHANGE

The second thing that works well for motivating The Elephant side of our brains is to **make the change seem achievable.** It could be a long way before you will reach it but this is just going to demotivate The Elephant. Make it small. Show how your CX initiative fits with what your company is already doing. Show it as an extension of an initiative already in place. Position it as a low-hanging fruit. Work with short time horizons.

### CULTIVATE A SENSE OF IDENTITY

And finally, **make people feel a part of a team or better still - of a community.** The practice of having CX champions (in whatever shape or form they exist) is a step in this direction. In reality though, positioning 10-20-100 people as CX champions is more likely to create a divide rather than to unite people. What I'd say is to show everyone how they contribute to customers' success. Why not change the positions within the company to better match what everyone is doing for example?

### 3. SHAPE **THE PATH**

In addition to appealing to The Rider and The Elephant (the rational and the emotional side of our minds), **take care to clear the path of obstacles** that can make both stumble. Dan and Chip Heath offer the following advice: change the situation, build habits, and rally the herd.

#### CHANGE THE SITUATION

Amazon's one-click ordering is a brilliant example for clearing the path by changing the situation. So is Oral-B's introduction of brush heads whose colour fades to remind you you need to change it. In the second example, instead of fighting people's poor memory, they provided a memory aid. **Can you do the same with your CX initiatives? Can they be seen as profit-making projects instead of cost-saving ones for example?** Can you implement a 'pay for results' model with your suppliers? The options are myriad - explore them.

#### BUILD HABITS

**Building habits is one of the most powerful ways to change behavior.**

How do you do that? Well, habits have the following form: When X happens, I do Y, and this gives me benefit Z. Look for ways to trigger a different Y, a different behavior, by providing a reward when it happens. If you have the power to determine the incentives within your team for example, you can reward the people who delivered the best customer experience. You can also build checklists - these are a great way to trigger behavior. Or you can use the element of surprise to make people consider the new behavior. How many C-level executives know how beneficial delivering great CX can be for their company for example?

#### BUILDING HABITS STARTS WITH SOMETHING SMALL

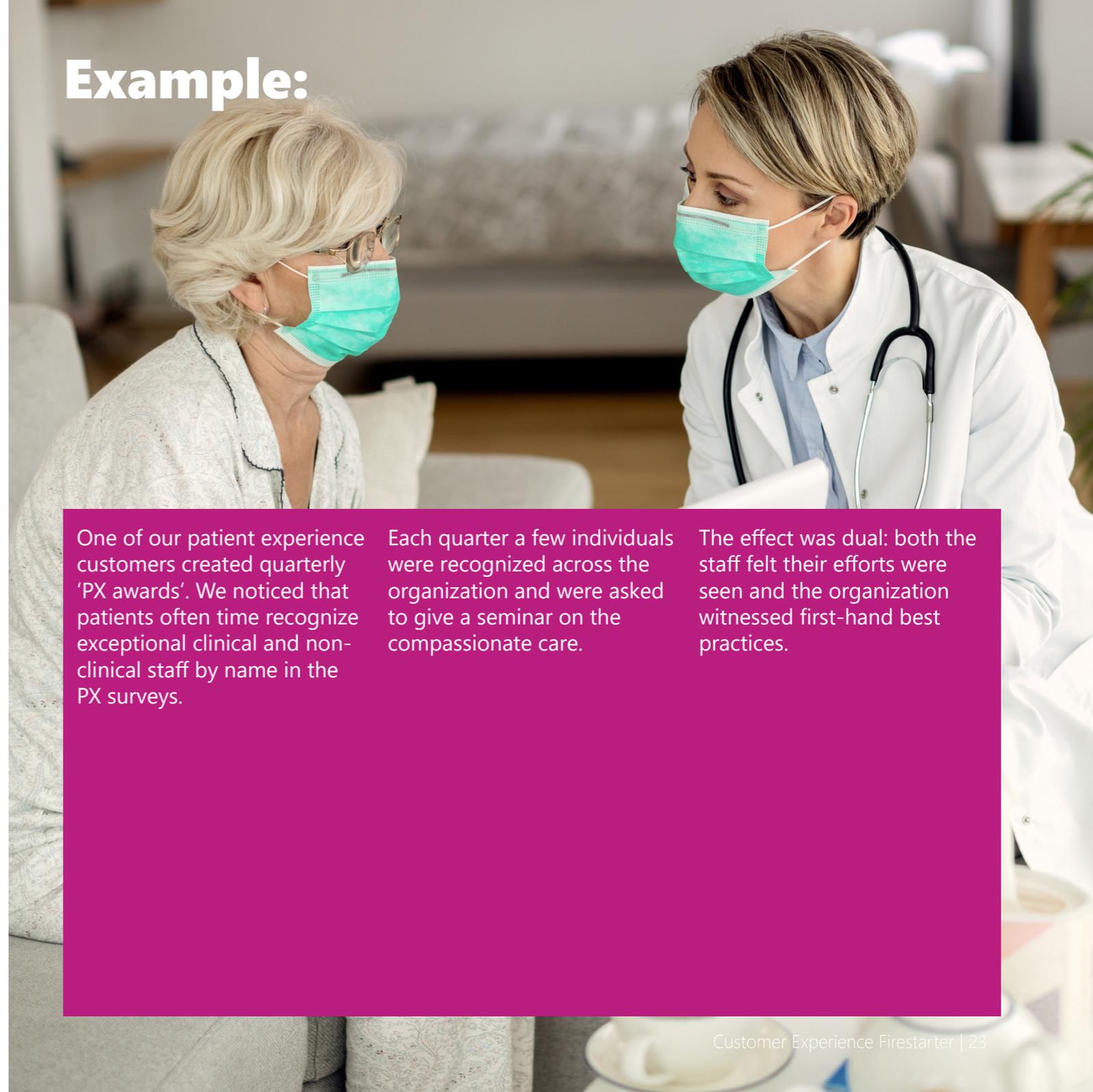
On one of the markets where our manufacturing client operates, the leadership implemented a project, called "Did you speak to your customer today?" to handle the problem of forgetting to notify customers of upcoming delivery delays. The project implemented simple reminders to the plant workers involved in delivery and lead to an immediate increase of notification phone calls to customers.



### RALLY THE HERD

And last but not least, **share and celebrate achievements.** Success breeds success and people naturally gravitate towards areas in which they can succeed. Generate wins and celebrate them as loudly as you can. Win awards for your CX efforts! Behavior, as Dan and Chip Heath say, is contagious. Help your people establish a correlation between working on improving customer experience and a successful career, and you'll achieve a lot.

## Example:



One of our patient experience customers created quarterly 'PX awards'. We noticed that patients often time recognize exceptional clinical and non-clinical staff by name in the PX surveys.

Each quarter a few individuals were recognized across the organization and were asked to give a seminar on the compassionate care.

The effect was dual: both the staff felt their efforts were seen and the organization witnessed first-hand best practices.

## RELEASE THE PARKING BRAKE WITH ADVICE FROM "THE CATALYST" BY JONAH BERGER



"Sometimes **change**  
doesn't require  
more horsepower.  
Sometimes we just  
need to unlock the  
parking brake."

## Example:

Instead of pushing and informing and convincing, maybe we are better off **thinking about the roadblocks that prevent people from changing** and work with and around them. Maybe it's better to eliminate obstacles to ensure a smooth journey, rather than forcing the engine to go full power.

### WHAT ARE THE ROADBLOCKS BERGER IDENTIFIES?

**1. Reactance:** an action has an equal and opposite re-action. You push people, people push back. Often times we push to much: we oblige people to care about NPS by putting it in their performance evaluation; we force service reps to follow scripts; we insist and insist in front of the board that we need this CX initiative.

To tackle the 'Reactance' roadblock do your best to "allow for agency". The goal here is to give people a choice; Jonah Berger puts it well - **"...let people pick the path. Let them choose how they get where you are hoping they'll go."** (p.29)

A client of ours with offices on more than 40 markets worldwide quickly realised in the first years of implementation of a global NPS program that strictly adhering to a standardized CX framework was robbing markets of the freedom to adjust the standards to the local realities.

For example, their survey templates were designed for customers where each touchpoint was handled by a different person – e.g. purchasing, delivery, usage, while in reality on the smaller markets most of their customers had a single point of contact who was responsible for the whole process.

Through our work together and bottom-up involvement in defining the localized customer journeys we were able to accommodate the global program framework to the needs of sales and marketing managers across markets.

The global standards today are used as a starting point, but local markets are allowed much flexibility. Also, the experience and insights markets gain are valued and used to evolve the global framework further.

**2. Endowment:** we like it easy so we stick with what we are doing. Unless there is a terribly good reason for it, we tend to do what we've always done. We can also call it 'the curse of success'. If what you are doing works, why change it? To future-proof your success could be one reason; the fact that no one stays ahead for too long another. **Yet, the road to CX excellence is often blocked by our own success.**

The 'Endowment' roadblock exists by and large because of loss aversion - we value what we possess more than what we don't, hence we are more afraid to lose than excited to gain something. And because beliefs are like possessions, the same applies to our minds. We dread the loss of something we believe in. How to work around this?

One powerful action you can take is to **make clear the cost of inaction.** Framing things in terms of losses is very powerful. What will happen if you don't act on improving CX? Will you lose this customer in 6 months? Will the customer lifetime value decrease by 20%? You can figure this out; once you do - use it to create a sense of urgency.

**3. Distance:** we like to work within our zones of acceptance. New information that is within it can land well but pushed too far it has no chance of success. Another reason hindering the success of CX practices within companies is what may hinder the success of any other initiative - the 'too much, too soon' syndrome. As an aside, novice runners know this very well - going for too many miles from the very beginning is the major reason for injuries; basically your body is pushing back on you. Sometimes we have a very clear idea of how the full CX program might look like and we enthusiastically share this vision with others. **If it's too new for them though we are likely to get rejected simply because it's too much for people to take in.**

The 'Distance' roadblock **go small and 'ask for less'**. Remember that the Distance roadblock exists because there is a large gap between your point of view and how the person you are convincing to do something sees the world. Also remember that there is always an overlap between you two, no matter how far you are. Use this 'movable middle' to find common ground. And don't ask for much - ask for a pilot, for a start, for a small change today, and then for another one in a week's time. **Small is beautiful.**

**4. Uncertainty:** if we are not sure in the outcome, we are unlikely to act. Uncertainty is probably the most common and easily identifiable reason why CX initiatives don't take off. Given that there are probably hundreds of things C-level execs can change within a company, would they bother with something with murky chances of success?

Uncertainty is often times the biggest roadblock. Let's use the right name for it, shall we - it's fear. Fear that we might lose something or not succeed. How to help people manage this roadblock? One thing we can do is give the option of a trial. By now this is a very popular way of managing uncertainty, given that you can get a demo or a short-term subscription to any piece of software. In essence, **anything that helps people try something without committing to it helps.**

**5. Corroborating Evidence:** we need more than anecdotal evidence; we need many people to show us or tell us something to start believing it. You cannot allow to be alone on the quest to build a customer-centric organization.

And finally, there is strength in numbers, and that's what helps work around the 'Corroborating Evidence' roadblock. **If you can show that a similar company has done something similar in a similar situation, that will be golden.** Or look for examples internally - has a colleague of yours done something that improved CX significantly? How can you celebrate this success? How can you tie success within the company with customer success?

## Example:

Our customer, a provider with multiple clinical and wellness locations, had a trend: some sites were performing exceptionally well in terms of CX, while others were lagging behind. There was no obvious difference between the two types of sites in terms of equipment, staff numbers or locations.

Through a dual advanced statistical approach, GemSeek was able to understand on site level the importance vs performance of each individual touchpoint, how it contributes the overall experience and how a positive change would impact each separate site's revenue. We helped the client tackle the reactance and distance roadblocks by providing a list of stepwise, prioritized improvements.

Unlike before, this time employee didn't have to deal with a list of 100 initiatives without knowing where to even start. Starting with a pilot on a few key sites then took care of the endowment, uncertainty, and evidence roadblocks. Site leaders were able to witness the transformation process and the positive revenue benefits this had.



## BONUS: SUCCESS STORY



How a healthcare and wellness provider **increased their revenue** after implementing our cloud customer and patient experience platform and advanced analytics solutions?

## THE BUSINESS PROBLEM

Understanding and working towards exceptional patient and customer experience is key for healthcare and wellness providers. Improvement initiatives have significant positive impact on clinical outcomes, staff satisfaction, referral rates and loyalty. Our client, one of the largest healthcare providers in Europe had a fragmented and semi-automated patient and customer experience program.

This resulted in lack of actionability, piecemeal improvements and disengagement. The management was looking for a stronger proof of the CX and PX program return on investment.

## OUR SOLUTION

We revamped the existing customer and patient experience program based on our cloud platform and advanced analytics products, which allowed our client to get a complete real-time view of results, close the loop easily within 48 hours, engage staff and prioritize actions that matter.

After successfully mapping the business structure of the customer, we fully deployed the platform to over 130 hospitals, clinics and wellness locations. Mirroring the client's complex organizational structure, we deployed short touchpoint surveys, designed custom reports and text analytics dashboards for all units, locations, and business lines. Our team organised trainings with key users on how to track progress, take action and prioritise activities for improvement to make a significant business impact.

The current setup allows executives across business lines, locations and functions to get actionable information in accordance with their responsibilities and quickly implement improvements or changes that lead to increase in customer and patient satisfaction.

Our client also took an advantage of our advanced professional services package which includes ongoing support, consulting and advanced analytics. We used our proprietary AI algorithms to identify the most important steps of the journey, to calculate the ROI of different improvement initiatives and to increase the self-paid episodes.

## KEY PROJECT SUCCESSES

- ◆ Over **120** impactful improvement initiatives successfully completed
- ◆ **+1.3 mil** surveys sent per year and over 10% response rate (non-incentivized)
- ◆ Over **7,000** automatic cases per year triggered: less workload by staff required by gathering complaints from all channels into one place
- ◆ **40,000** direct patient and customer comments categorized in 9 topics with drill
- ◆ **30%** increase in staff engagement

## BUSINESS IMPACT

**7%**

growth in self-paid episodes

**+5%**

increase in NPS YoY

**60%**

decrease in time spent on CX program management

Ready to **ignite a change** with your CX or PX program?

**TALK TO US!**



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