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HCD for CX

A Rios Partners Field Guide
for using human-centered design
to improve customer experience

Perform Phase

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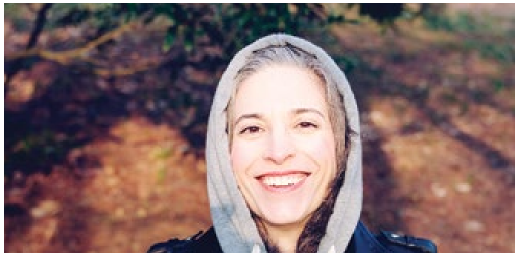
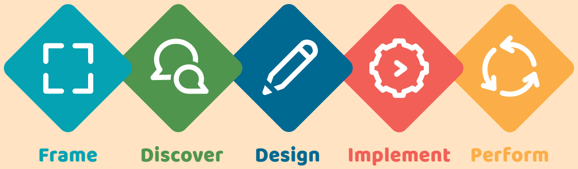


Perform Phase

The five phases of the Rios Partners HCD process



Objectives

The final phase, Perform, is ongoing, as you will need to ensure that your solutions continue to meet changing customer needs over time. By creating an ongoing conversation with the customer, you will be able to iterate on products and services, keeping them relevant and producing sustained value for the customer and your organization.

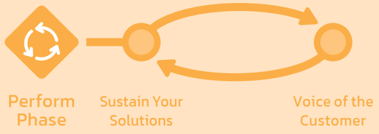
Mindset

As you proceed through the Perform phase, be sure to apply each element of the HCD approach:

- **Empathy:** The Perform phase is the stage where you establish an ongoing rhythm of communication with customers. Customer needs will change, and you should position your organization to capture those changes using the same deep empathy you have been practicing throughout the HCD process.
- **Iteration:** You are never done iterating solutions. As part of the Perform phase, you will revisit solutions at a regular cadence and ask questions such as: Is it still effective? How do you know? What is the next iteration of this idea? When and how will you test it?
- **Flexibility:** You have exercised flexibility throughout the HCD process, reframing constantly and embracing failure as part of the process. The next step is to become more flexible and agile as an organization so that everyone is empowered to develop good ideas, build and test them quickly, and pivot their approach based on feedback.

Process

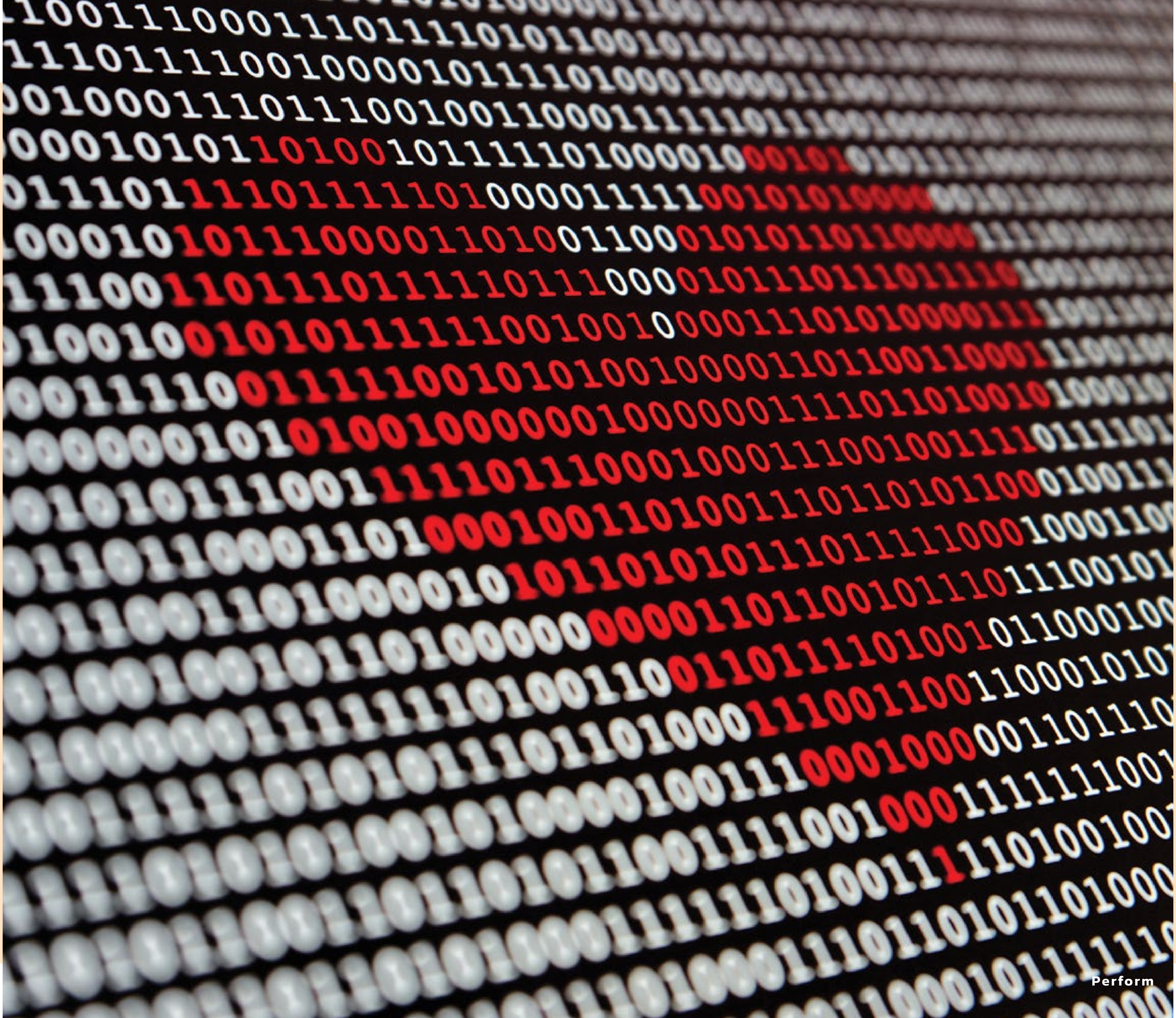
The Perform phase includes the following core steps:



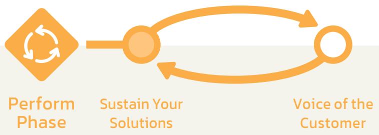
Phase-gate

The Perform phase is a continuous loop that does not "end". You know you are meeting the perform objectives when your team is aligned on answers to the following questions.

1. **How is our organization tracking changing customer needs and how are they changing?**
2. **What is our plan for tracking and sharing key metrics?**
3. **Who owns the Voice of the Customer in our organization?**



Sustain Your Solutions



What

Develop a sustainment plan that allows you to measure performance and adjust your rolled-out solutions based on ongoing feedback. The plan should involve a detailed strategy for tracking and sharing metrics on existing solutions as well as a process for identifying new problems to put through the entire HCD process.

Why

A well-developed sustainment plan will help you make informed decisions on how to adapt existing solutions, pursue new opportunities, and make targeted investments to continue to meet customer needs as they change over time. By implementing strategies to measure and iterate your solutions in perpetuity, you will deliver ongoing value to the customer and to your organization.

Resources for this Step

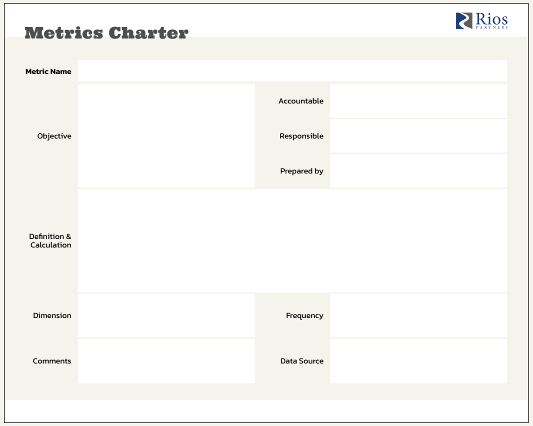
| p. 15 **Metrics Charter**

How

1 Formalize the measurement plans you created for each solution during the Implement phase into a coherent measurement framework that allows you to track the performance of your solutions in real-time.

Continue to iterate the **Measurement Pyramid** to show how each of your solutions ladder up to your top-level organizational goals by improving the customer journey and driving key actions and outcomes. Refine the **Metrics Tree** for each solution to ensure you have measurable inputs, outputs, and outcomes, as well as a way of measuring the “3 Es” of customer experience. You should be using both quantitative and qualitative measures to identify instances where you are not getting the results you hoped for.

2 Create a **Metrics Charter** for each metric you plan to track. The charter defines each metric, clarifies its purpose, and documents who is accountable and responsible for the metric.



Metrics Charter

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Metric Name			
Objective		Accountable	
		Responsible	
		Prepared by	
Definition & Calculation			
Dimension		Frequency	
Comments		Data Source	

3 Consider building out a Metrics Dashboard that is updated regularly to quickly share relevant indicators with interested stakeholders across the organization. As you design and build your dashboard, apply the principles and process of HCD to ensure you are building it to meet the needs of the people using it.

4 Use quantitative and qualitative analysis to unearths new problems, continue the Frame-Discover-Design-Implement-Perform cycle to empathize with customers, identify needs, and implement impactful solutions.

Voice of the Customer

Perform Phase
Sustain Your Solutions
Voice of the Customer

What

As part of the Perform phase, a team should be designated to own the “Voice of the Customer” within the organization. This team should be empowered to continue the conversation with the customer and to bring that perspective as an ongoing input into strategic decision-making within the organization.

Why

To continually deploy products and services that sit at the center of desirability, feasibility, and viability, your organization will need to have a process for representing the Voice of the Customer in business decisions.

Resources for this Step

| p. 15 **Metrics Charter**

How

1 **Create a Voice of the Customer Charter**
There are four key capabilities that a Voice of the Customer team should own: discovering customer insights, designing and implementing solutions, measuring performance, and training the organization.

Use the **VOC Charter** template to ensure each capacity has an owner who is accountable and a team that is resourced to carry out the VOC functions. There is no one formula for how to set this up; VOC responsibilities could be one piece of a larger job description or one or more full-time roles, depending on the organization, its structure, and business model. If an organization has many diverse customer types, you might have different VOC leads representing different segments. The goal is to establish a “single source of truth” the organization can look to for understanding the customer’s experience.

2 **Represent the Voice of the Customer in business decisions**
At a baseline, the Voice of the Customer team should be consulted and given an opportunity to represent the customer’s perspective ahead of key decisions made by the organization. You might also consider a model where the Voice of the Customer team is given decision-making authority and becomes accountable for outcomes across the organization. Independent of structure, the key is to ensuring customer needs are being well-represented in the organization’s decision-making process.

3 **Plan and execute design sprints**
A Voice of the Customer team should engage in a constant loop of problem framing, discovery, and design to generate insights and prototypes that address customer needs. The VOC team is the team in your organization that identifies promising areas for design and passes on insights and working prototypes to other teams within the organization for further development and implementation.

Perform Phase Tools:

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Question It Answers
How do your solutions drive your organizational goals?

What it Does
Links your solutions through an improved customer journey to your larger organizational goals

p. 13 **Metrics Tree**

Question It Answers
How will you measure each level of the Measurement Pyramid for each of your solutions?

What it Does
Establishes specific metrics to track inputs, outputs, the customer journey, and the actions that will lead to your intended outcomes

p. 15 **Metrics Charter**

Question It Answers
How will you track the metrics you want to measure?

What it Does
Defines each metric, clarifies its purpose, and documents who is accountable and responsible for the metric

Measurement Pyramid

Question it Answers

How do your solutions (pilots) connect to your organization's purpose?

How To Use It

For each of your pilots, the Measurement Pyramid links your solution through an improved customer journey to your organization's purpose.

1 Recall what you started with in the Frame phase. Your organization's purpose should be the same. Remember, everything must connect to why the organization exists (e.g., a hospital sustaining healthy, thriving communities and building trusted relationships with those who need medical care) not simply what your organization does (e.g., providing comprehensive medical services).

2 In the second row, refine the desired outcomes based on your refined understanding of the problem through Discover and Design. Think of these as project KPIs that connect to the organization's purpose (e.g., improved clinical outcomes and increase in transparency with patients). Note, these should be linked to strategic outcomes your organization has already outlined.

3 Then, refine the list of actions you would like customers to take in order to achieve the desired outcomes (i.e., outputs). For example, in order to achieve better clinical outcomes you might want to increase consistency in patient check-ups. As you identify outputs, be sure to draw a line to the outcome(s) the output is connected to.

4 Once you identify the actions you would like customers to take, identify the moments that matter to customers that enable them to take those actions. For example, you may have confirmed your hypothesis from the Frame phase that making it easier for patients to schedule an appointment will drive increased consistency in patient check-ups. The moment that matters would be "scheduling an appointment." Be sure to connect the moment that matter to the related output(s)

5 Finally, fill in the solutions you will pilot and connect them to the moments that matter to customers. For each solution, it is critical to identify activity metrics that will let you know if the solutions is performing well (e.g., 1. the quality of the solution 2. the performance or speed of the solution 3. the cost of the solution). For scheduling appointments, the solution may be an online scheduling portal as opposed to everyone calling to make appointments. For this, you could measure the time it takes to schedule an appointment in the portal as well as the number of calls received with questions about how to use the portal.

Some of your desired actions may not align with moments that matter. This is an important consideration. Be sure to ground your decisions on what to measure in empathy, considering the optimal customer experience.

Measurement Pyramid

Levels of measures

1 Organizational purpose

2 Outcomes driving organizational purpose

3 Outputs

4 Customer Journey

5 Solutions

Measurements

As measured by:
Why does your organization exist?

As measured by:
What are the key things you measure to determine whether your organization is fulfilling its purpose (think KPIs or objectives of OKRs)?

As measured by:
KPIs (e.g., the “key results” of OKRs) that lead to the desired outcomes and allow you to determine if your solutions + customer experience are delivering the desired results.

As measured by:
What is the customer experience?

Emotion: I felt **(emotion)** throughout **(action performed).**

Ease: It was easy to **(output action)** with **(whom or what).**

Effectiveness: I successfully did **(output action)** with **(whom or what).**

What are the key touchpoints that have a disproportionate impact on the customer's experience?

As measured by:
Are the products and services working as they should?

1 The quality of the solution

2 The performance or speed of the solution

3 The cost of the solution

Metrics Tree

Question it Answers

How will you measure each level of the Measurement Pyramid for your pilot solution?

How To Use It

A Metrics Tree helps you establish quantifiable metrics to track progress from your solution through every level of your Measurement Pyramid to your organizational goals.

1. Start by filling in your Goal at the top.
2. Now start at the bottom and move up to the goal. This will help ensure that your measurements are connected to the top-level goals. Consider how you'll measure inputs (e.g., number of products built) and outputs (e.g., number of products used) of your pilot.
3. Next, determine how you will measure qualitative customer experience of your pilot using effectiveness, ease, and emotion statements (e.g., On a 1 to 5 scale from strongly disagree to strongly agree: "It was easy to get where I needed to go using this product'").
4. Finally, document how the outputs and the improved journey will drive quantitative outcome metrics (e.g., number of subscription renewals; percentage of customers who lack safe transportation). Keep laddering up your metrics until you arrive at your organizational goals.

Metrics Tree

Goal

______ of ______________________ by ______________
(% or #) (your organizational goal) (desired time)

Outcome

______ of ______________________ by ______________
(% or #) (your intermediate goal) (desired time)

Output

Solution output

______ of ______________ who have ______________________ during ______
(% or #) (Customers) (desired action or shift) (time)

Customer experience

Emotion: I felt ______________ throughout ______________________
(emotion) (action performed)

Ease: It was easy to ______________________ with ______________________
(output action) (whom or what)

Effectiveness: I successfully did ______________________ with ______________________
(output action) (whom or what)

Solution
(inputs)

______ of ______________________ reached by ______________
(#) (solutions) (Customers)

Targeted Journey
(moment that matters)

The targeted moment that matters is ______________________________________

Metrics Charter

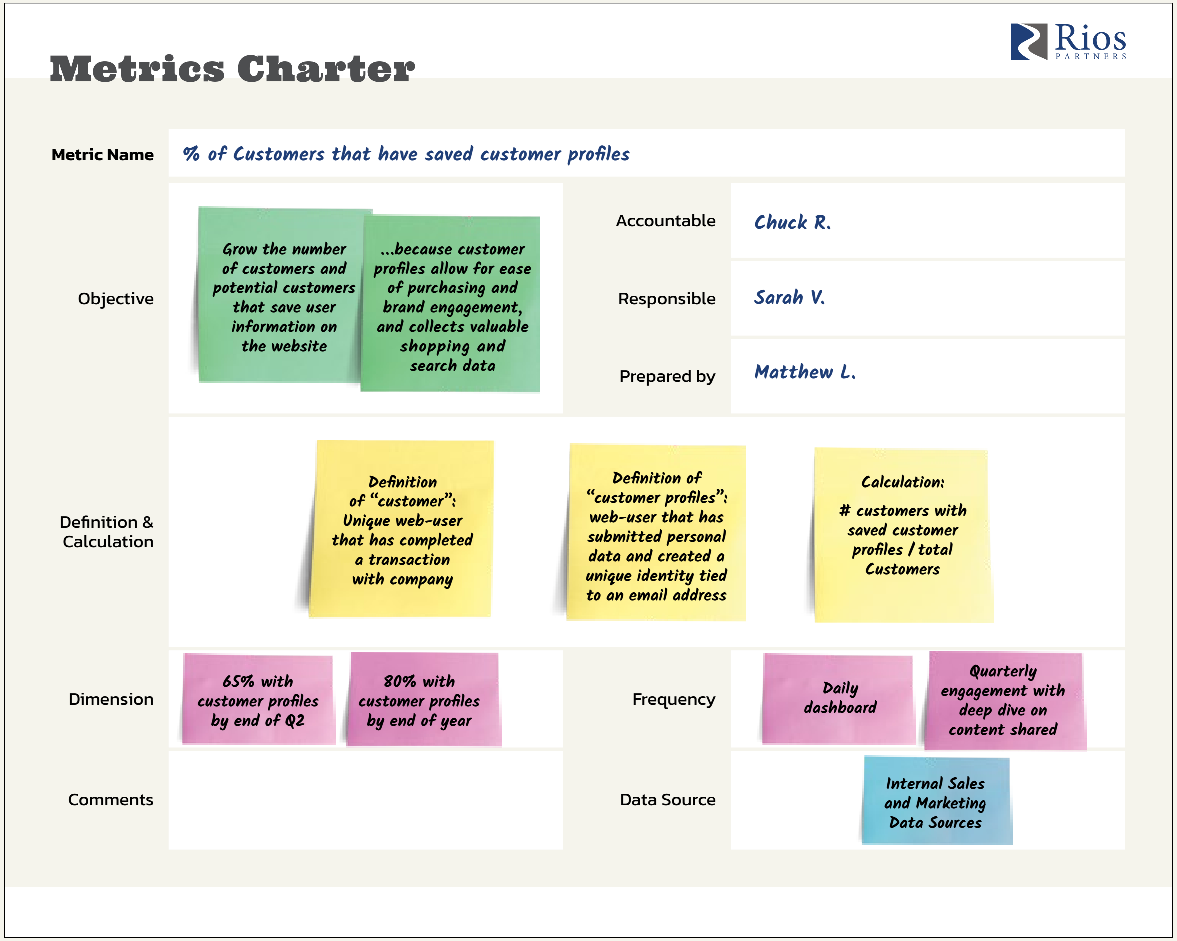
Question it Answers

How will you track the metrics you want to measure?

How To Use It

A Metrics Charter defines each metric, clarifies its purpose, and documents who is accountable and responsible for the metric. Create a Metrics Charter for each metric you plan to track.

1. Identify an idea to develop further.
2. Use the template or build one on a large sheet of paper. Feel free to make more blank rectangles as needed to tell your story.
3. Draft the man story line: beginning, middle, and end.



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Metrics Charter

Metric Name % of Customers that have saved customer profiles

Objective
Grow the number of customers and potential customers that save user information on the website
...because customer profiles allow for ease of purchasing and brand engagement, and collects valuable shopping and search data

Accountable Chuck R.

Responsible Sarah V.

Prepared by Matthew L.

Definition & Calculation
Definition of "customer": Unique web-user that has completed a transaction with company
Definition of "customer profiles": web-user that has submitted personal data and created a unique identity tied to an email address
Calculation: # customers with saved customer profiles / total Customers

Dimension
65% with customer profiles by end of Q2
80% with customer profiles by end of year

Frequency
Daily dashboard
Quarterly engagement with deep dive on content shared

Comments

Data Source
Internal Sales and Marketing Data Sources

Metrics Charter

Metric Name

Objective

Accountable

Responsible

Prepared by

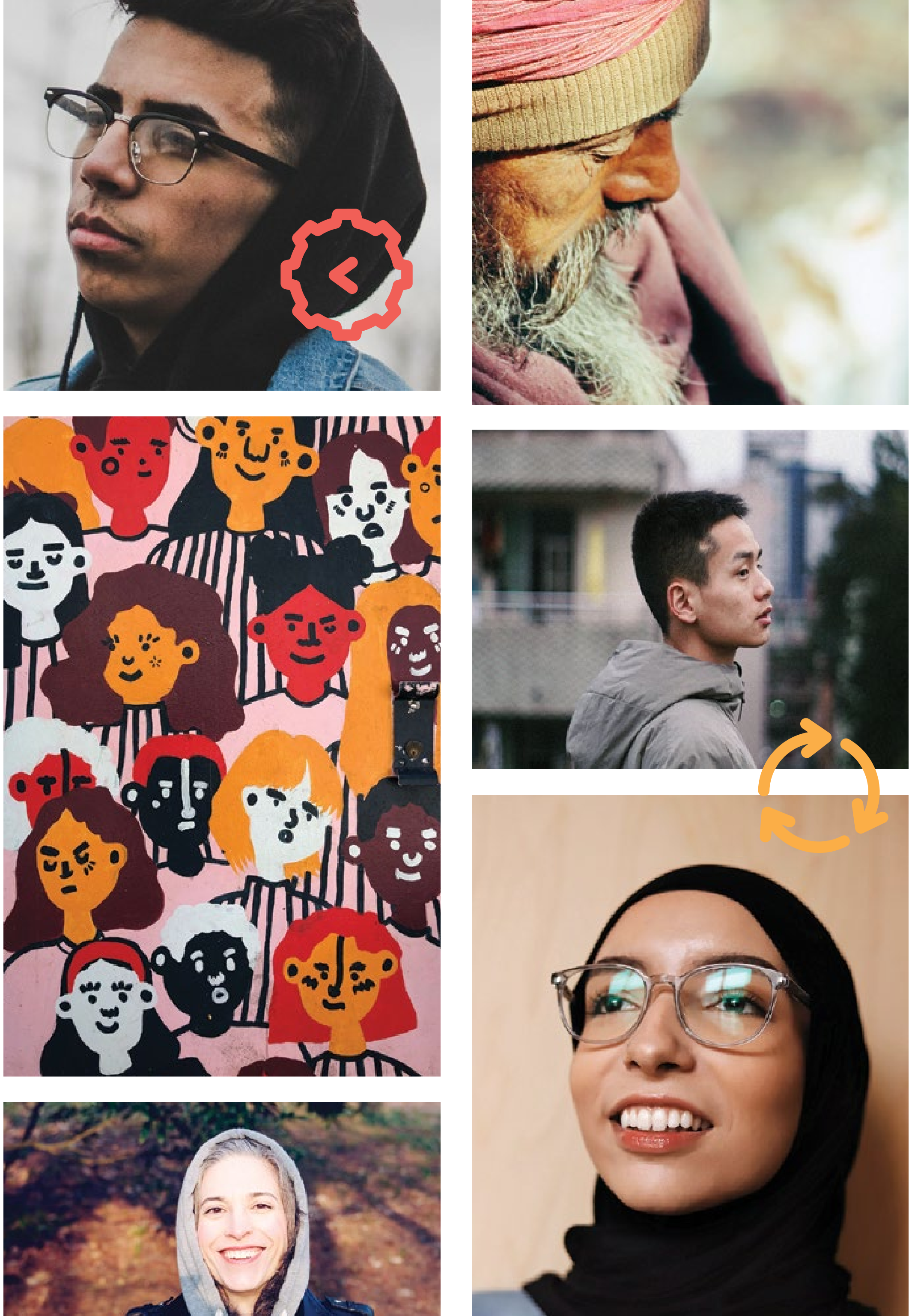
Definition & Calculation

Dimension

Frequency

Comments

Data Source



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