Patricia Seybold Group

Trusted Advisors to Customer-Centric Executives

Building Buy-In for Customer-Centric Initiatives

Facilitate Group Interviews with Key Stakeholders to Build Trust and Momentum

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Patricia Seybold Group / Methodology

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ISSUE: OPERATIONS IN SILOS IMPACT THE QUALITY OF CUSTOMER EXPERIENCE

The Other Guys Are Creating Problems for Our Customers!

Nobody wants to be part of an organization that annoys or frustrates its customers. Yet employees often feel that the problems their customers face were created by bad policies, broken systems, or, worse, inept colleagues in other parts of the organization.

Here's a typical example, from the customer experience director of a residential cable company:

> Each of our departments does the best job they can to make customers happy, but in doing so, they often compound a customer issue. When a customer complains about an outage, the customer support representative may offer him a refund for the time lost or a free upgrade to Internet service. Mollified, the customer accepts the complimentary Internet service offer. When the field service representative arrives to install the upgrade, the customer expects the installation to be free, but the field service technician doesn't know that. He knows he has to get paid for the work he does in the field and get the customer to sign off on it. He suspects that the customer support representative offered to "comp" the customer a month's free service, but he knows that the phone representative doesn't have the authority to waive the installation fee. He explains this to the customer. But the result is that the customer is annoyed twice and is now convinced that he's dealing with a customer-unfriendly organization. Then, to compound the situation, the customer's next bill is confusing. There's a new service charge that the customer doesn't understand; it looks as if he hasn't been credited for the outage; and he has been billed for the Internet service upgrade, which was supposed to be free. Now, the customer is really upset! He doesn't want to pay the bill, but he also doesn't want to spend more time on the phone dealing with an organization that obviously doesn't have its act together.

Inadvertent and compounding mistakes like these are unfortunately very common in almost every complex business. Solving these kinds of problems typically requires major end-to-end process redesign, business policy changes, and technology glue.

Even if you want to streamline the end-to-end customer experience, it's difficult to get the top-down support and the purview to do so. And it's equally hard to convince your cynical colleagues that there's any way to fix problems that are seemingly deep rooted and intractable. So, even if you do manage to muster the will, gain the charter, and commandeer the resources to streamline Customer Scenarios® that cross functional departments, you still have to convince the people in each functional area to work together toward a common goal. They've been through these kinds of initiatives before. They're shell shocked and skeptical. They know that if the people in the other departments would get their acts together, there wouldn't be so many customer-impacting screwups, but they don't see any way that things will actually improve this time around.

GETTING EVERYONE ON THE SAME PAGE

What's the best way to begin to build the will and the desire to fix problems that cross functional areas? Over the years, we've found a simple technique that goes a long way toward building trust among skeptical, but well-intentioned, stakeholders. We interview them together, in cross-functional groups—getting them to build a collective picture of how bad things really are, and a collective vision of how great things really could be.

Group Interviews Build Trust

We've been using the simple technique of conducting group interviews for over twenty years. I learned this approach from my father, John Seybold, who was a labor arbitrator before he became a business/technology consultant helping publishers all over the world transform their publishing operations from hot metal typesetting to electronic editing, composition, and page make-up. When I apprenticed with my Dad, I noticed that every consulting project included several group meetings with diverse constituents. At a big city newspaper, for example, the linotype operators, word processing supervisors, reporters, editors, ad takers, and ad sales representatives would often be included in the same meetings. My dad ran these sessions as if he were holding a big dinner party. He would artfully get everyone talking about problems and issues, contributing their views, sounding off, and making suggestions. Because he was a skilled arbitrator, he managed to turn people's accusations about "the other guys' stupidity" into objective descriptions of what went wrong, how and why, with no personal judgments or character assassination.

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In fact, one of the benefits of a group interview is that people are unlikely to attack people personally. They're much more likely to share their grievances and commiserate with one another. In individual interviews, on the other hand, people often feel that it's OK to bad-mouth the other guy.

Group Interviews Are Time Efficient

Most internal and external consultants use interviews as an important part of any change process. You interview your sponsor, you interview key stakeholders, you interview customers, you interview management. Setting up and conducting lots of interviews is actually a very time-consuming and costly process for everyone involved. And, while interviewing a lot of people gets the consultants up to speed and makes people "feel heard," individual interviews don't actually make anything happen. Group interviews do.

GROUP INTERVIEWS BEGIN THE CONSENSUS-BUILDING PROCESS. If you pull a cross-functional set of people into a group interview for an hour or two, you save countless hours of scheduling, as well as interviewers' time. But much more important, by bringing everyone together to contribute collectively to the solution of a set of seemingly intractable issues, you have actually started moving toward the solution.

HOW IS A GROUP INTERVIEW DIFFERENT FROM A MEETING? "But we have meetings all the time," you're probably thinking. "We pull people together to kick off projects, to work on task forces, to get updates. What's different about this?" The differences are:

- There are no presentations.
- There is no agenda, other than gathering information and sharing ideas.
- It's a safe space to compare notes and build bridges.
- There are no right or wrong answers.
- Everyone's views are valued.

For a good group interview, you ideally want to include 15 to 30 people. Each of them gets a chance to contribute. Each one hears what the others (people in other departments, with other perspectives) have to say. Each contribution spawns additional comments and contributions from the other participants. Everyone learns a lot more about the issue or topic at hand. People walk away from the session with a completely different picture of how their piece fits into the whole.

Group Interviews Create a Shared Mental Model and Spawn Conversations and Goodwill

The most important outcomes from a well-facilitated group interview are momentum, conversations, and goodwill. When I look back at the most successful consulting engagements our group has done—the ones that actually catalyzed major changes in organizations and had lasting results—each of these "successful" engagements included group interviews toward the beginning of the project. Each time that I have insisted on using the group interview technique as opposed to the "go out and talk to everyone individually" technique, we have created more profound and lasting change in the organization.

CREATE A SHARED MENTAL MODEL OF CURRENT REALITY AND VISION. Although I base our group interview technique on my Dad's inclusive, egalitarian, "no name-calling" approach, over the years, I added an important ingredient—one that takes on a life of its own in your organization: It's called structural tension. I learned it from Robert Fritz, one of my mentors, and the author of many courses and books on the creative process.[1] Here's how it works (it's very simple): You develop a clear picture of your current reality—the way things are today. And you develop a powerful vision—the way you'd ideally like them to be. You hold onto and nourish these two concepts simultaneously. The creative process automatically kicks in, and the tension will always resolve in the direction of your vision.

Our group interview approach helps a group of people create a shared mental model both of current reality and of a shared vision.

Therefore, our group interview approach helps a group of people create a shared mental model both of current reality and of a shared vision. We all walk out of the interview with the structural tension between the clear and complete picture of our current reality—how bad things really are—and our shared vision—what we'd all like to have happen, if anything were possible. Then nature takes its course, and people will naturally gravitate toward taking action in the direction of their shared vision. This is why a seemingly simple idea—let's get everyone together and compare notes—takes on power and momentum and builds a strong foundation for lasting change.

CATALYZE CONVERSATIONS. I'm always impressed by how much people who work in the same organization can learn about one another and about how other departments actually operate in the course of these group interviews. There are always several points at which people will say: "I didn't know you did that!" Or "We do that, too; we should talk." Or "I can help you with that." Or "You should talk to so and so." You know you've done a good job in conducting a group interview when there's a buzz at the end of the session, during which people seek each other out, swap contact info and make plans to continue the dialogue.

Of course, the conversations continue. They take place in the hallways, in the cafeteria, or whenever these folks bump into one another again. (You can help keep those conversations alive by creating additional opportunities for these same folks to come back together—in an internal Customer Scenario® Mapping session, for example.)

The conversations also ripple out beyond the group of folks who participated in the group interview. Everyone goes back to their office, and each person usually tells at least one other person something they learned in the session. That person may pass the insight or observation along, and so it goes.

When you're seeding strategic conversations, you want to be careful about the tone you set. The mood is important. You don't want people to walk away pointing fingers at each other. You want them to walk away thinking about systemic issues, about the pull of the shared vision they've just created, and about their part in achieving that vision. A friend and colleague, Rose Moss, taught me a great deal about strategic conversations. Rose, an author who grew up in South Africa, observed the role that carefully seeded conversations played in defeating Apartheid in that country. "People would come up to you at a bus stop and say things like 'Why do the colored buses come less frequently than the white buses?' or

[1] See *The Path of Least Resistance for Managers: Designing Organizations to Succeed* by Robert Fritz (Berrett-Koehler Publishers, Inc., 1999) or *Corporate Tides, the Inescapable Laws of Organizational Structure* by Robert Fritz (Berrett-Koehler Publishers, Inc., 1996).

'You should shop at Joe's store—they're really good people and their prices are fair, even though they're white.'" Strategic conversations were the most powerful tools that South African change agents in the United Democratic Front used in their work toward a non-violent transition to a "non-racial" society with equal rights for all.[2]

SPAWNING GOODWILL. There is always a danger that getting a group of people together to compare notes about how bad things are or what's broken will create more distrust and dissension, rather than less. That has never happened with any of the dozens of group interviews we've conducted over the years. But I can't guarantee that it won't happen to you.

I believe that the most important ingredient required to create goodwill as opposed to ill will is "the vision thing." If you can get people to tap into their own personal vision and to brainstorm a sense of what could be done, you can defuse the negativity. Don't be heavy-handed about creating a shared vision. What I'm talking about is not a formal mission/vision/objectives kind of exercise. What you're going for toward the end of your group interview is what philosopher Fernando Flores calls "a conversation for possibilities."[3] This is a different kind of conversation from the discussion that takes place in a negotiation or a planning meeting. It's a conversation in which you lightly explore possibilities, surface ideas, think about options. It's not even necessary to come to closure. You're simply planting the seeds of possibility. And you're sowing goodwill as you do so.

It's a conversation in which you lightly explore possibilities, surface ideas, think about options. It's not even necessary to come to closure. You're simply planting the seeds of possibility. And you're sowing goodwill as you do so.

While there may be a few action items that arise out of a group interview, your main goal is to create the shared mental model of current reality and a shared mental model of the ideal ("if anything were possible"). That's how you begin to lay the groundwork for cross-functional collaboration and co-creation.

HOLDING GROUP INTERVIEWS TO BUILD BUY-IN FOR CUSTOMER-CENTRIC INITIATIVES

I'm not sure that it's easy to teach people how to run these kinds of interviews by describing the technique in writing. It's the kind of thing that it's easiest to learn through apprenticeship, as I did with my Dad, and as my consultants have learned from me. On the other hand, I suspect that some of you have probably discovered this technique, or a similar one, on your own. But perhaps you haven't applied it to this particular problem space: helping an organization become more customer centric. So here are some tips and some sample questions to get you started.

TIPS FOR RUNNING YOUR OWN GROUP INTERVIEW SESSIONS

We've summarized the logistics and the overall framework and structure of a typical cross-functional stakeholder group interview session in Table A.

When Should You Use the Group Interview Approach with Stakeholders?

There are several times in the course of any project or initiative that we recommend that you use this technique to gather input from a variety of stakeholders and to engage them in co-creating a solution. Use cross-departmental and cross-business-unit interviews in the following situations:

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[2] Rose Moss's book, *Shouting at the Crocodile: Popo Molefe, Patrick Lekota and the Freeing of South Africa* (Beacon Press, 1990), describes the role of strategic conversations in conquering Apartheid.

[3] See the seminal work, *Understanding Computers and Cognition* by Terry Winograd and Fernando Flores (Addison Wesley, 1997). Or see the more recent book, *Building Trust: In Business, Politics, Relationships and Life* by Robert C. Solomon and Fernando Flores (Oxford University Press, 2003).

- You are kicking off a project and trying to wrap your minds around it. What's the right approach? What should the scope be? What's the most important focus? How will you gauge success? You'll get these questions answered, and, at the same time, you'll build consensus and an extended cross-functional team to help you during the project.

- You have scoped the project in general and you have your focus and marching orders, but you now need to better understand the specific Customer Scenarios® that this project will be addressing. You may need to interview several different cross-functional groups of stakeholders in order to get a complete picture. The people who participate in these interviews will also provide excellent candidates for the internal stakeholders you'll need for your Customer Scenario Mapping sessions.

- You find yourself running into political or organizational barriers or roadblocks anytime during a project, and you need to build more buy-in.

Whom Should You Invite?

We recommend that each interview group have 15 to 30 people who do not normally work together directly, but whose jobs and departments impact customers or customer experience in some way. The particular stakeholders you need will depend on the scope or focus of your project. But be sure to include people at both the policy-setting level and people at the "rubber meets the road" level. And include people in at least four different departments or functions. Include, in particular:

- Customer service or support front-line personnel
- Sales people and sales support staff
- Channel partner managers
- Billing
- Finance and accounting
- Operations
- Logistics and fulfillment
- Product development
- Marketing
- Merchandising
- Customer research
- Ebusiness
- Contact center operations
- IT architects
- People from different geographic regions
- Customer advocates
- Business process professionals
- Etc.

Setting Expectations

Invite people to join you in a one-and-a-half- to two-hour "information gathering" session. Tell them that you need and value their perspective and input on how we can make it easier for our customers to do business with us. Ask them to think ahead of time about any customer-impacting issues they're aware of and to bring any ideas they have for improving the customer experience.

Interview participants will always want to know the answers to these questions:

- What will you do with this information? Who will be seeing it?

- Will any actions be taken? If so, when?

- Why will this project be any different (more successful) than any other projects or business process redesign efforts we've attempted?

- Why do you think anything will happen this time?

You will need to answer each of these questions three times:

1. When you invite them to participate
2. When you begin the meeting
3. When you close the meeting

Your answers to these questions will be specific to the project you're engaged in, but be sure to tell them that what is different this time is that you are all co-designing the solutions from the customer's point of view.

Tell them that you will be gathering their input and providing notes of the meeting back to them with the collective observations and recommendations of the group, and that this information will serve as primary input for your project.

What Questions Should You Ask?

In Table A, we describe a recommended flow for the interview session. Your goal is to get everyone contributing, building upon one another's contributions and ideas. The mood you're going for is informal and collegial. Aim to recreate the feel of the best (most stimulating and inclusive) dinner party conversation you ever enjoyed.

Of course you'll need to tailor the particular questions to the goals of your meeting. Here's a sample starter set:

- What are all of the ways that we make it hard for our customers to do business with us?
- How do we make it hard for our partners to do business with us?
- How do we make it harder for our partners to support our customers well?
- What's harder than it should be for us to do in support of our customers?
- What's hard for us to do on behalf of our customers?
- How do we want our customers to feel about our brand?
- If anything were possible, what kind of end-to-end customer experience would we deliver?

For extra credit, or if the goal of your interview session is to derive key Customer Scenarios, you should also be asking the following:

- What are the different kinds of customers we have?
- Our segments
- Their roles
- Their demographics
- Their communities of practice
    - What do these different groups of customers want to do?
    - What are their desired outcomes?
    - What are the different contexts in which they're trying to accomplish these outcomes?
    - What are the things that matter most to them?
    - What are their conditions of satisfaction?

What's the Follow-Up?

Within a few days of the meeting, you should capture the notes from the interview sessions and send them back out to everyone who participated. Encourage people to correct anything that wasn't captured correctly and to add any additional thoughts they've had.

HOW WILL YOU KNOW IF YOU'VE BEEN SUCCESSFUL?

You can tell by the mood of people as they leave the room and by the buzz that the session creates. If people talk about the issues and ideas that came up during the session, then you've done a good job. If corridor conversations and networking continues, then you've done a fantastic job!

Tips for Holding Group Interviews to Build Cross-Organizational Buy-In for Customer-Centric Issues

Whom to Invite	Explanation/Description
15 to 30 people from at least 4 different departments or functional organizations	A large group is preferable as long as everyone can hear each other. That's because you want to get people who don't normally work together talking with one another. And the more people you have, the faster the conversations will spread after the interview session.

Tips for Holding Group Interviews to Build Cross-Organizational Buy-In for Customer-Centric Issues *(continued)*	
Whom to Invite	**Explanation/Description**
15 to 30 people from at least 4 different departments or functional organizations *(continued)*	If you have a lot of ground to cover, run several of these sessions, inviting different cross-functional groups to each one. If you organize the discussions by topic, you may have some of the same people attend more than one interview session, but they'll contribute their input and insights on those different topics.
Logistics	**Explanation/Description**
1.5 to 2 hours Large conference table or tables set in a U- or O-shape—so that everyone is facing each other	• A one-hour meeting won't be long enough for everyone to have a chance to contribute. One-and-a-half hours is usually enough, but two hours is even better. • You want everyone to be able to see and hear one another. If you have up to 15 people, you can probably get by without microphones. If the group is larger than that, try to have microphones available for people to use without having to pass them around. • Use flip charts to capture major issues and discussion points.
Interview Flow	**Sample Comments Questions**
State the purpose of this meeting.	We want to gather your input about the ways in which we, as an organization, make it hard for customers to do business with us (in relation to project X, topic Y). We will use what we learn here today to set customer-centric priorities for project X. This is the first of a series of steps in which we'll be seeking your help and involvement. If we all work together, we believe that we have a better chance of creating a more seamless end-to-end experience for our customers.
Introduce yourselves and your roles. Get the discussion rolling.	Introduce the facilitators first, and set an easy, informal tone—kind of like a dinner party conversation. Encourage humor and interaction, but go around the table in order so that everyone contributes in the first round of introductions. Good ice breakers are: 1. Tell us your name, title/role, and where you sit in the organization. 2. What your biggest issue with the quality of the customer experience we deliver today?
Spend the first third of the time building a complete, shared mental model of current reality.	Ask for volunteers, and let people contribute to the discussion and build on each other's contributions. Call on those who haven't volunteered until everyone has contributed and you have a complete picture.
Spend the next third drilling into issues that need more clarification.	People will offer both problems and solutions. Capture both. Encourage brainstorming. Discourage name-calling or finger-pointing. Give feedback what you hear in objective but sympathetic or humorous tones. Encourage people to build on what others have said. Draw out the silent lurkers.

Tips for Holding Group Interviews to Build Cross-Organizational Buy-In for Customer-Centric Issues *(continued)*	
Interview Flow	**Sample Comments Questions**
Spend the last third of the session building a shared mental model of a collective vision ("if anything were possible").	Get people brainstorming. Get everyone excited about possibilities. Have them describe the customer's ideal experience, including how it feels and how it makes the customer feel. Get everyone juiced about the possibilities
Close the session on time.	Thank them, reset their expectations, and answer questions about how this information will be used.
Deliver a summary report promptly.	Be sure to include the names and titles of everyone who participated. Do not include who said what. The summary should be a collective report. Follow up with calls/thank-yous to solicit more ideas and future involvement. Provide status reports on the project going forward to these stakeholders. Encourage them to include others and to network with others.

Table A. Here are some tips for organizing and setting up a group interview session, and a sample flow for a session. Don't make this a formal agenda. Use this format yourself to lead the session. Keep it organic and natural. Have fun!