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## Maritz Solutions: Blueprinting

Effective scorecard management

### What is it?

**Blueprinting shows how your business processes relate to customer experiences and your future success.** Most executives have a mental picture of the road to results, but this knowledge is not documented or proven. Blueprinting maps the links between operations, employees, communications, customers and financial data to gain consensus and create direction.

### Why do I need it?

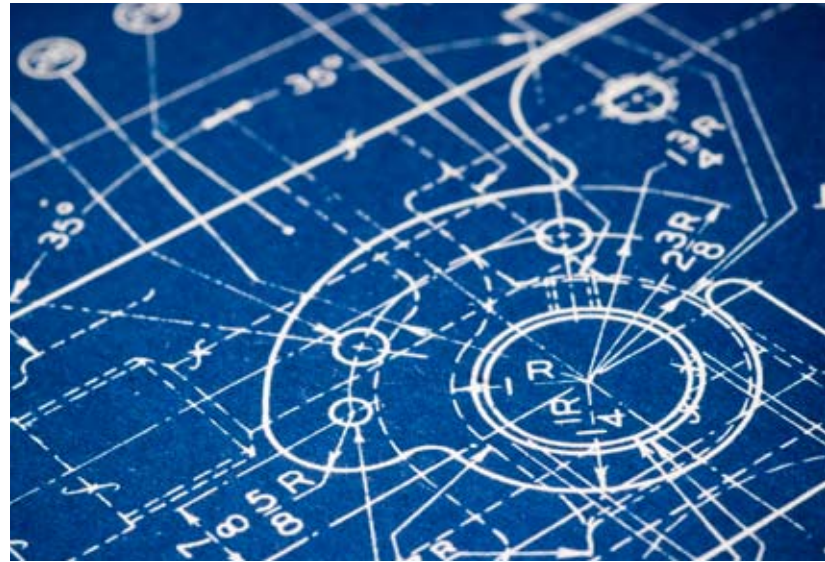
Creating positive change after research demands an effective approach to action planning. Blueprinting ties your research to business metrics to ensure you drive ROI. By considering the views of a broad group of people within your organisation, Blueprinting clarifies the customer issues, reveals resources needed to make improvements and assigns responsibilities to increase the likelihood of success.

### How is it done?

Maritz facilitates workshops with a cross section of key stakeholders to create a map of the customer experience. We start by agreeing how you want customers to behave in order to achieve your financial goals – retention, acquisition or up-sell for example. Next we find the experiences and brand opinions customers must have in order to behave in the desired way. Then we work out the operational processes that influence those experiences and identify and empower the people who own those processes. So, with our help you can achieve a business that is truly in touch with your customers.

### Why Maritz?

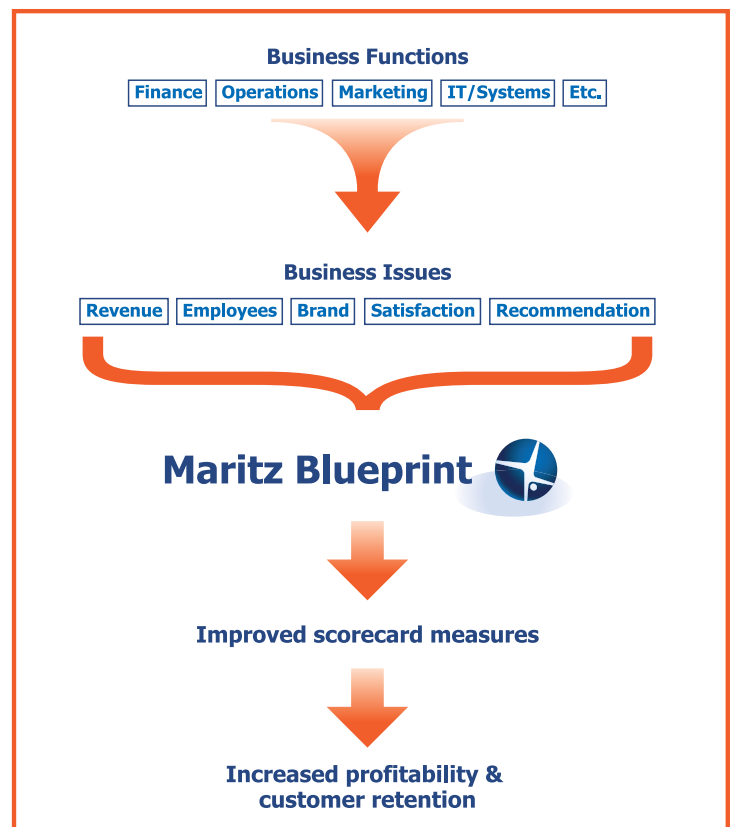
Maritz focuses on understanding and managing customer experiences to improve performance. We work across organisations, to improve service overall. As this involves a detailed dialogue with a range of departments, we have developed expertise in our understanding of how such departments operate. We know how to spot and overcome the barriers, ensuring a positive outcome. Our ability to create and use meaningful links between numerous data sources from across organisations has become world class. By identifying and using these links, our analysis brings clarity and confidence to our clients.



### Who should be involved?

Creating a Blueprint for your organisation is a team effort. It requires collaboration between the functions with the most impact on a customer's experience.

#### Maritz Research Blueprinting



## A bit more detail

Every Blueprint is different, although they all have a broadly similar structure that can be adapted easily to suit specific needs.

Action	Aim
Desk research	Familiarisation with organisation and situation
On-site workshop(s)	Consensus build of Blueprint
Follow up meetings	Deep dive Blueprint topics – add depth
Data audit	Population of Blueprint with existing internal and external data
Documentation	Comprehensive write up of workshops and interviews
Debrief	Face to Face presentation of Blueprint and opportunities

Different data sources from across organisations are integrated to demonstrate the relationships between what you do as an organisation, what each customer experiences when interacting with your organisation and the consequent outcomes of those experiences. Many organisations already do elements of this. However, what they don't do is achieve the following:

- Understand the true drivers of customer retention
- Analyse root causes
- Align management information to strategy
- Diagnose management information
- Integrate reporting suites

We use proven techniques to integrate existing business metrics, such as revenue and other 'hard' measures with survey and other customer derived data. This is a powerful way to increase clarity and confidence in the decisions that are made.

A data audit works on two important levels. On the one hand it demonstrates which data you already have, but it also reveals what critical data you are missing. Deciding how to plug knowledge gaps is a vital next step in the process.

### Action Planning

We use a tried and tested approach to action planning with our clients. The key to this is the inclusion of additional planning stages to underpin the success of the plans created. For example, by assigning responsibilities across the Blueprint you establish clear ownership of problem areas and ownership of their solutions. We know from experience that a more considered action plan will have greater success – this may sound simple, but it's not.

### Build consensus on the following issues:

1. How does your company make money?
2. Which customer behaviours are required to generate revenue?
3. Which attitudes drive these behaviours?
4. Which customer touch points influence these attitudes?
5. How do internal processes and external impacts drive these touch points?
6. What does a good customer experience look like?

**Investing in a Blueprint means you bring together a unified view of the customer experience and create a single vision for its management and subsequent improvement.**