Take Your Dog to Work Day: Identifying and Understanding Your Customers

Dan Cooke, Alysha Myers, & Sara Crosby
Meet Your Presenters

Dan Cooke

• DOL Senior Research Analyst specializing in motorcycle & young driver data
• Joined DOL in 2016
• Certified Green Belt
• An avid fisherman & father of 2
• With “Shae Vizla”

Alysha Myers

• DOL Business Architect specializing in ecosystem modeling, capabilities modeling, and customer experience
• 2-time boomerang DOL employee
• An amateur artist, pianist, DIY-er & mom of 2
• With “Royal Scratchy-Pants”

Sara Crosby

• DOL Improvement Manager with a passion for improving customer experiences in Government
• Joined DOL in 2006
• A lover of coffee and audiobooks, and mom of 2
• With “Thunder”, a 130 pound Italian Mastiff
Background

How many minutes visits does it take to get a CDL?
Today’s session

Do you know...

How to identify your customers?

When to include your customers’ voice?

Your customers’ needs and wants, and understand their perspective?
A Human-Centered Approach

How do we consider customer experience within our process improvements?

- **Look** from a perspective of outside-in
- **Develop personas** to empathize with customers and understand their unique needs
- Use tools to help you **identify your customers** and when to include their feedback
Customer Experience (CX)

CX Defined: “How customers perceive their interactions with your company.”

– Forrester

CX happens every time a customer interacts with your organization – its employees, services, or devices.

How do we understand our customers’ experience?
Customer Experience: Understanding Outside-In is the Key
Inside-In or Outside-In?

**Inside-In**
Focus is on internal processes, systems, tools, and products.

**Outside-In**
Focus is from customer’s perspective and processes, tools, products, and decisions are made based on their needs.
Take Your Dog to Work Day

Your organization is considering a new engagement initiative, Take Your Dog to Work Day (TYDTWD). You’ve been invited to participate in an exercise to identify our impacted customers and stakeholders for this initiative.

- At headquarters building as a pilot
- Only dogs
- Dogs must have current vaccinations
Who is involved?

Customers: Receiving a product or service

Stakeholders: Impacted by changes we make

Partners: Participate in or support changes

Discussion: Who is impacted, and what category do they fit in?
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## Persona Worksheet

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- **Persona Name:**
- **Sketch:**
- **Goal:**
  - **Saying:**
  - **Doing:**
- **About:**
  - **Feeling:**
  - **Obstacles:**
Exercise: Build a Persona

• Build a persona that represents a customer type (5 mins)
• Introduce us to your Persona!
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Personas
A fictitious person who represents a segment of your population.

Jack, e-permitting user

BACKGROUND
Title: The Finance and Insurance Manager
Organization Size:
Payroll was $3.8 million with 67 employees
Industry:
Car dealership

JOB ROLE
Reports To: The General Manager
Responsibilities:
- Print out the sales or lease contract and make sure that the buyer’s financing is in order.
- Present and arrange dealership financing.
- Offer customers a number of additional products and services for purchase such as extended warranties, paint protection, LoJack or a car alarm system. These items can be very profitable for the dealer.
- Seek new lending institutions and maintain good working relationships to secure competitive interest rates and financing programs.
- Process financing and leasing deals accurately and secure approval through the proper federal, state and corporate channels.
- Understand and comply with federal, state and local regulations that affect the new and used-vehicle and finance departments.
- Create and maintain a program with the sales department that will ensure all new sales are referred to the F&I department.
- Train and provide the sales team with information on
Got Voice?

Who are you listening to?

Who are they?
- Customers
- Stakeholders
- Partners

Where are they?
- Are they a part of your organization?
- Are they external?
Got Voice?

How are they impacted?
- Directly
- Indirectly

What is a direct impact?
If this process potentially will change:
- How they do it
- What they receive
- What is expected of them
Got Voice?

Do you need their input?
- Do they have information integral to the process?
- Intangibles?

Can you take action on their opinion?
- What’s in your power to change?
- Bound by law?
Got Voice?

How can you engage with them?
- Invite to the team
- Communication plans
- Get Voice!

How can you gather information?
- Surveys
- Questionnaires
- Interviews
- Focus Groups
- Gemba Walk
Are they internal to your organization?

NO

Are they a Stakeholder / Partner?

NO

Will they be directly impacted by this change?

NO

BE PREPARED TO STOP

YES

Will the change have a direct impact on them?

NO

Do you need their input?

YES

GET VOICE!

YES

INVITE THEM TO THE TEAM!
Every time.
✓ Today: Who’s it gonna be?
✓ This week: Create a persona
✓ This year: Get Voice
Thank You!