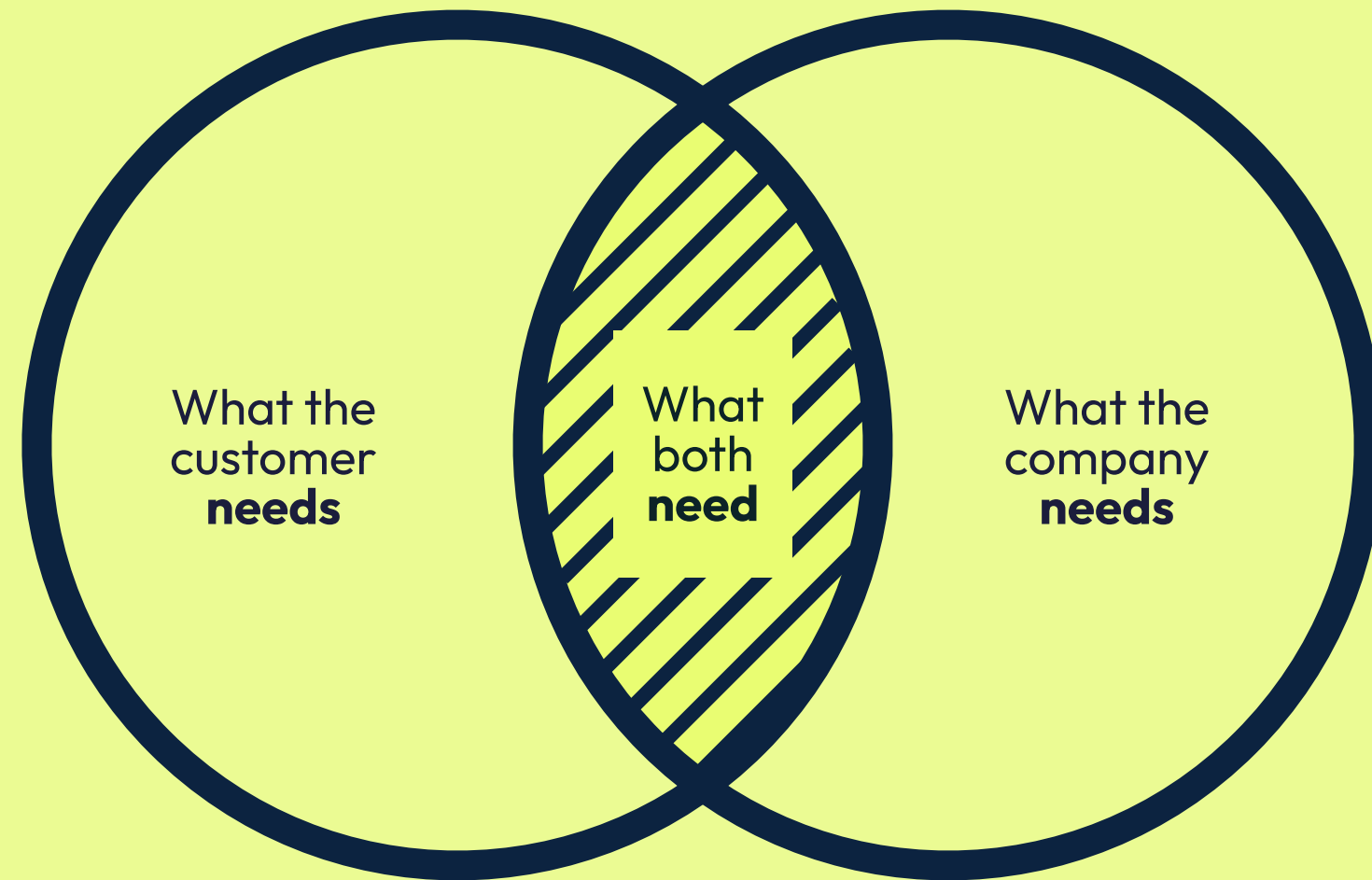


# A Customer\* Transformation

Developing an aligned strategy and definition for a Customer\*  
Transformation across an organization, identifying its key capabilities  
and competencies in a now, near and next roadmap.

\*A customer is e.g. a person, patient, caregiver, physician, nurse, pharmacist, payer, employee

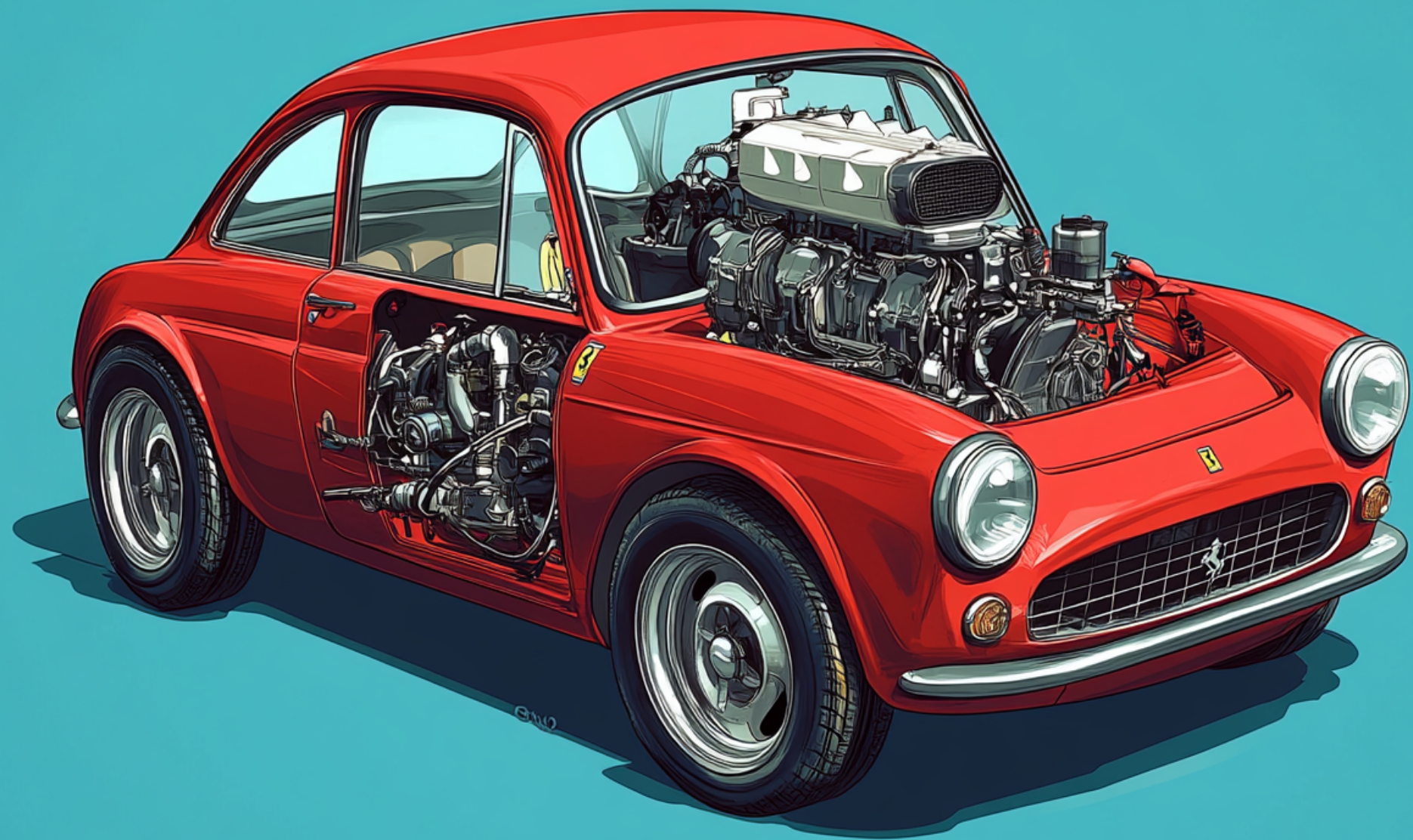
Helge Tennø



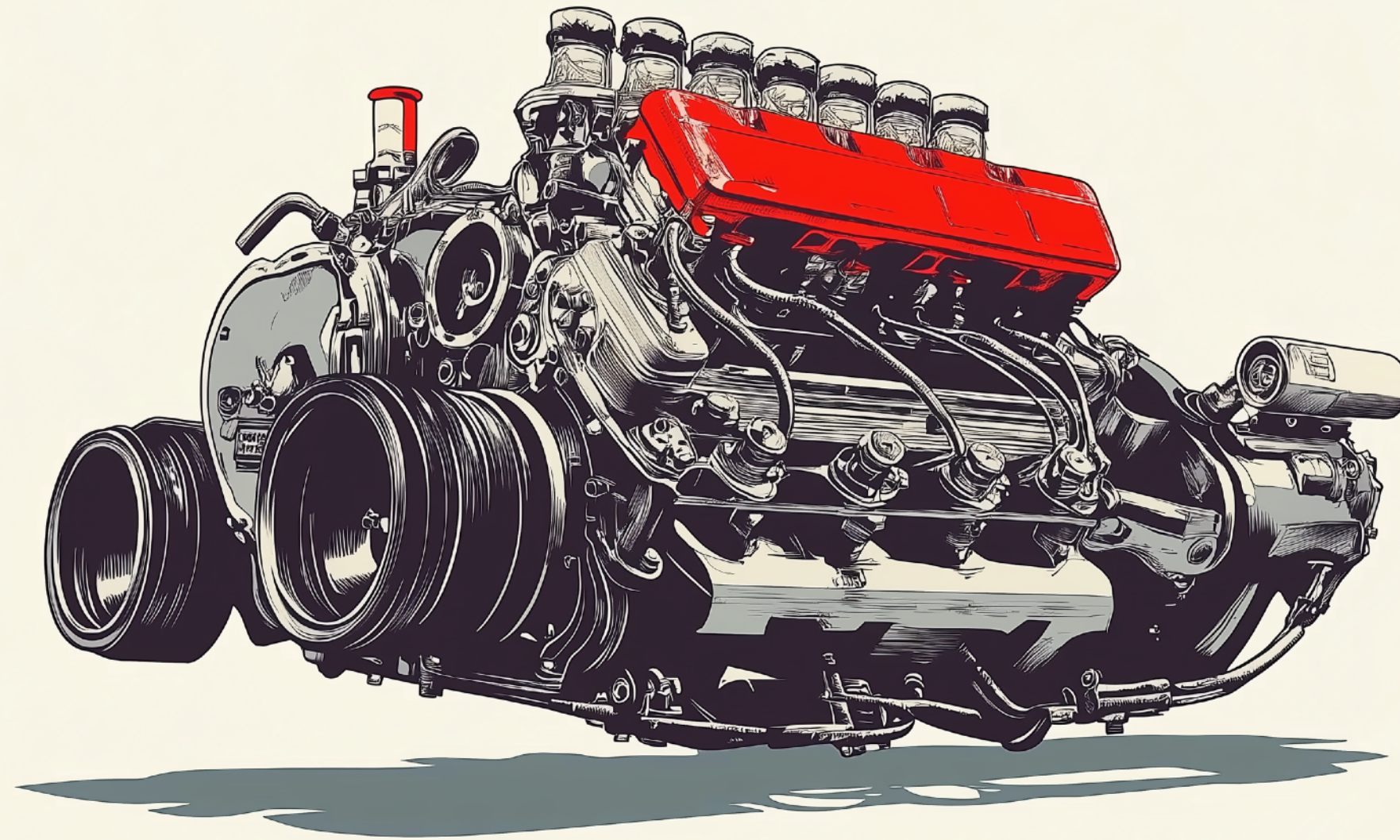
What the  
customer  
**needs**

What  
both  
**need**

What the  
company  
**needs**



Like putting a Ferrari engine into a Fiat ...



# DEMAND

**“88% of business transformations fail to achieve their original ambitions”**

BAIN & COMPANY 

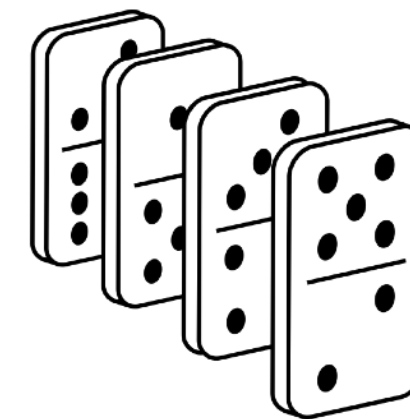
“People have changed more than the business organizations they must depend upon for consumption and employment” - Shoshana Zuboff

# The Customer Transformation

## Starts here

creates demand propelling the rest of the process

Starting anywhere else  
creates frustration, confusion and lack of commitment



JOKULL



If we change the **why** we are doing what we are doing

e.g. from selling products to serving customers' needs

then we are going to ask new **questions**

... which will demand new **data** and **insights**

.. leading to new types of **experiences**

.. demanding new **technologies** and **competencies**

.. needing a new **way-of-working**

and to be **measured** and incentivize in a new way.

EXAMPLES OF COMPETENCIES:

- Mindset and language -

- Curiosity versus control -

- Thin, thick and rich data, Casual models, data quality, sensemaking -

- Understanding and partnering with the right technology partners -

- Marketing technologies, new skills and talent -

- Agile, experimentation -

- Chain-of-measure / line-of.sight, outcomes focus-

A responsive organization needs something to respond to ...

2019

# Agile + CX + Data & Analytics



**Michelle Gilboy**

Helping Executives in fast-moving industries design better operational strategies and build organizational health



**Jean Gagnon**

Agile Implementer, Change Enabler, Realization Driver, People developer

“Silo busting”  
- Michelle Gilboy



# Why did we need it?

#1

A shared approach to benefit from shared investments in capabilities and competencies

#2

A shared understanding and language of what the customer is and means to the organization

#3

To secure future investments in technology and data are productive and efficient

**Decrease in overall satisfaction** / experience with interaction with PharmaCos over the last 12 months.

McKinsey&Company

**CX quality** among brands in the US **declined** for an unprecedented second year in a row. Despite more than 80% of business leaders indicating that improving CX is high priority, just 6% of brands saw significant increase in 2023, compared to 10% the year prior.

<https://www.forrester.com/report/the-us-customer-experience-index-rankings-2023/RES179408>

FORRESTER

Improved Customer Experience is the second most desirable outcome for companies AI-investments. Yet at the same time **poor customer experience** is the **4th most common outcome**

<https://go.clear.ml/new-research-report-on-enterprise-generative-ai-adoption>



# Timeline:

**Quantitative**  
insights



XX.XXX - XX.XXX

Step 1:

**Market Insights and definitions**

Synthesis of 39 Internal & external research reports

**39**  
Reports

**Qualitative**  
insights



XX.XXX - XX.XXX

Step 2:

**Insights, logic and needs**

57+ internal interviews

**57**  
Interviews

**Strategic**  
Decisions



XX.XXX - XX.XXX

Step 3:

**Priorities**

Impact and feasibility assessment

Identifying prioritized opportunity spaces



XX.XXX - XX.XXX

Step 4:

**Strategy Summaries**

What are we solving for, what does success look like and what is the value proposition?

**Identify capabilities and roadmap**  
In partnership

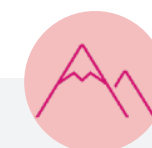


XX.XXX - XX.XXX

Step 5:

**Capabilities & Roadmap**

Identify capabilities in a now-near-next roadmap



-

ABC

**CX Summit**

Finalizing the roadmap for capabilities and rollout



**Erica Metzger**  
CX, Digital



**Linda Daniels**  
Innovation, CX



**Robin Fransz**  
CX/UX Strategy and Research



**Andrea Rubinstein-Sanchez**  
Agile Coach



**Michelle Gilboy**  
Change Leadership



**Helge Tennø**  
Customer Strategy

Step 1:



# Market Insights and definitions

**39**  
Reports

Creating a shared understanding and language.

Customer Experience  
Dynamic question 1: What does customer experience look like across our company now and looking forward towards the end of 2025?  
Part 1: Market Outlook | Output

	NOW :	NEAR (2025):
WHAT INFLUENCES AND ENABLES CX?		
WHO/WHAT DOES CX IMPACT?		
HOW DO WE WIN?		
WHO DOES CX SHOW UP WITH?		
WHERE DOES CX SHOW UP?		
SERVING THE CUSTOMER		
CUSTOMER RELATIONSHIP AND LOYALTY		
DIVERSITY, EQUITY AND INCLUSION		
INSIGHTS AND SENSEMAKING		
DATA QUALITY		
WHAT DO MEASURES LEAD TO?		
CX-ECOSYSTEM		
CX#		

## Questions:

1. What influences and enables the customer?
2. Who / what does the customer impact?
3. How do we win?
4. Who does the customer show up with?
5. Where does the customer show up?
6. How and where are we serving the customer?
7. What is the nature of our relationships and loyalty?
8. How are we ensuring diversity, equity and inclusion
9. What describes our insights and sensemaking
10. What describes our data quality
11. What do measures lead to?
12. What is the customer ecosystem (technology)?
13. How do we deliver on the customer + AI

Step 1:



# Market Insights and definitions

Creating a shared understanding and language.

Strategy & definition

## CUSTOMER EXPERIENCE



Aspiration:

Creating meaningful connections with ...



How:

Changing the **'why and how'** ...

Step 1:

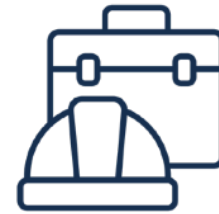


# Market Insights and definitions

Creating a shared understanding and language.

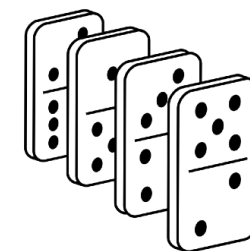
From:

“I’m doing the same work, creating the same outputs, being measured the same way. Why do I need to change?”



To:

**Change the “why” and  
the “how” will follow**



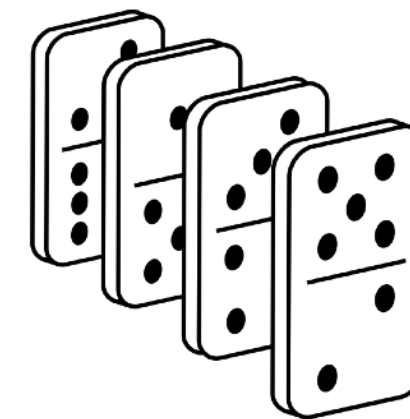
“Changing ‘what’ the work is” - Michelle Gilboy

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Step 2:



# Insights, importance and needs

**57**

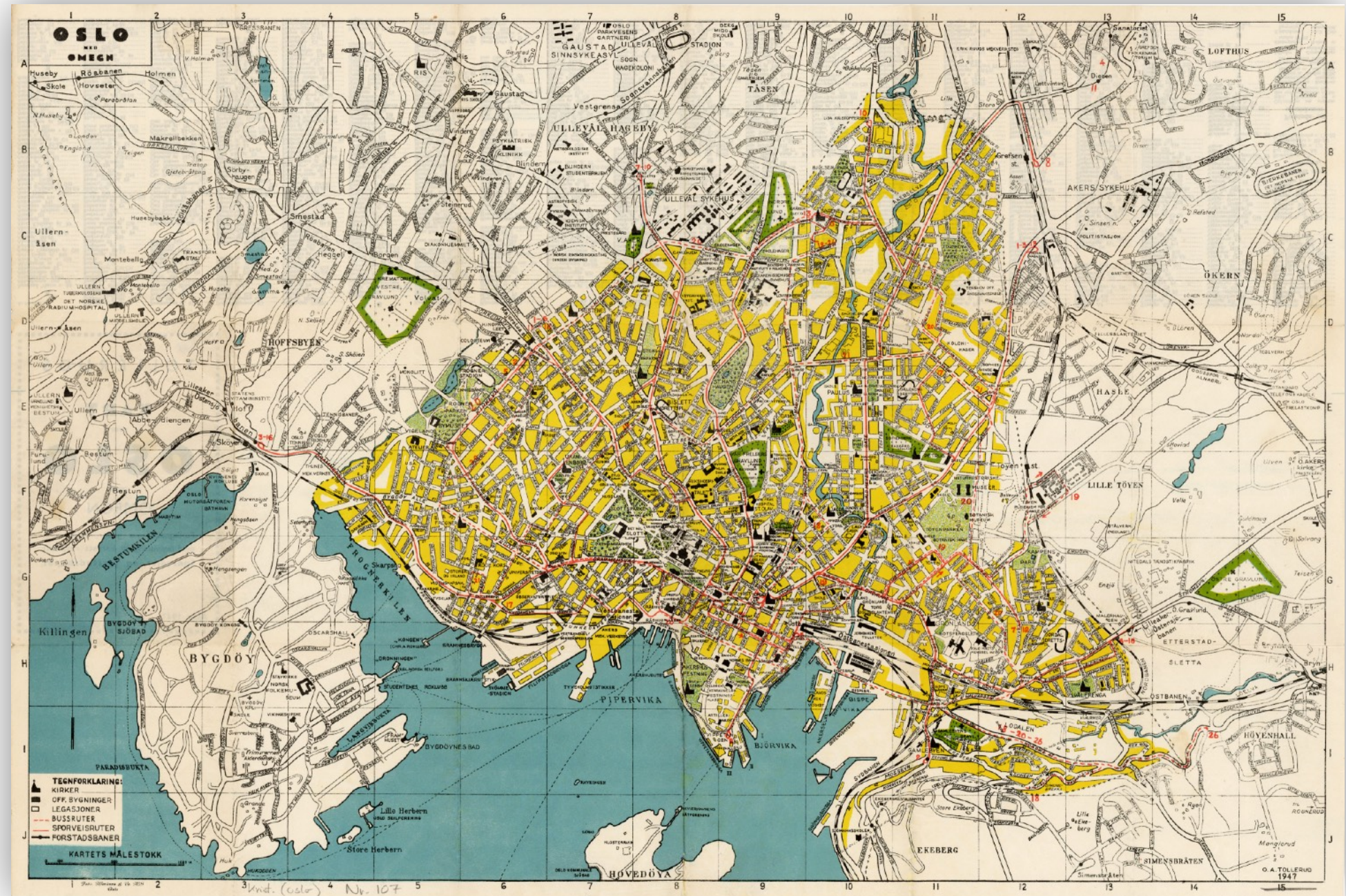
Interviews

Interviews:  
Where is the  
customer and what is  
their the role inside  
the organization?

**43**

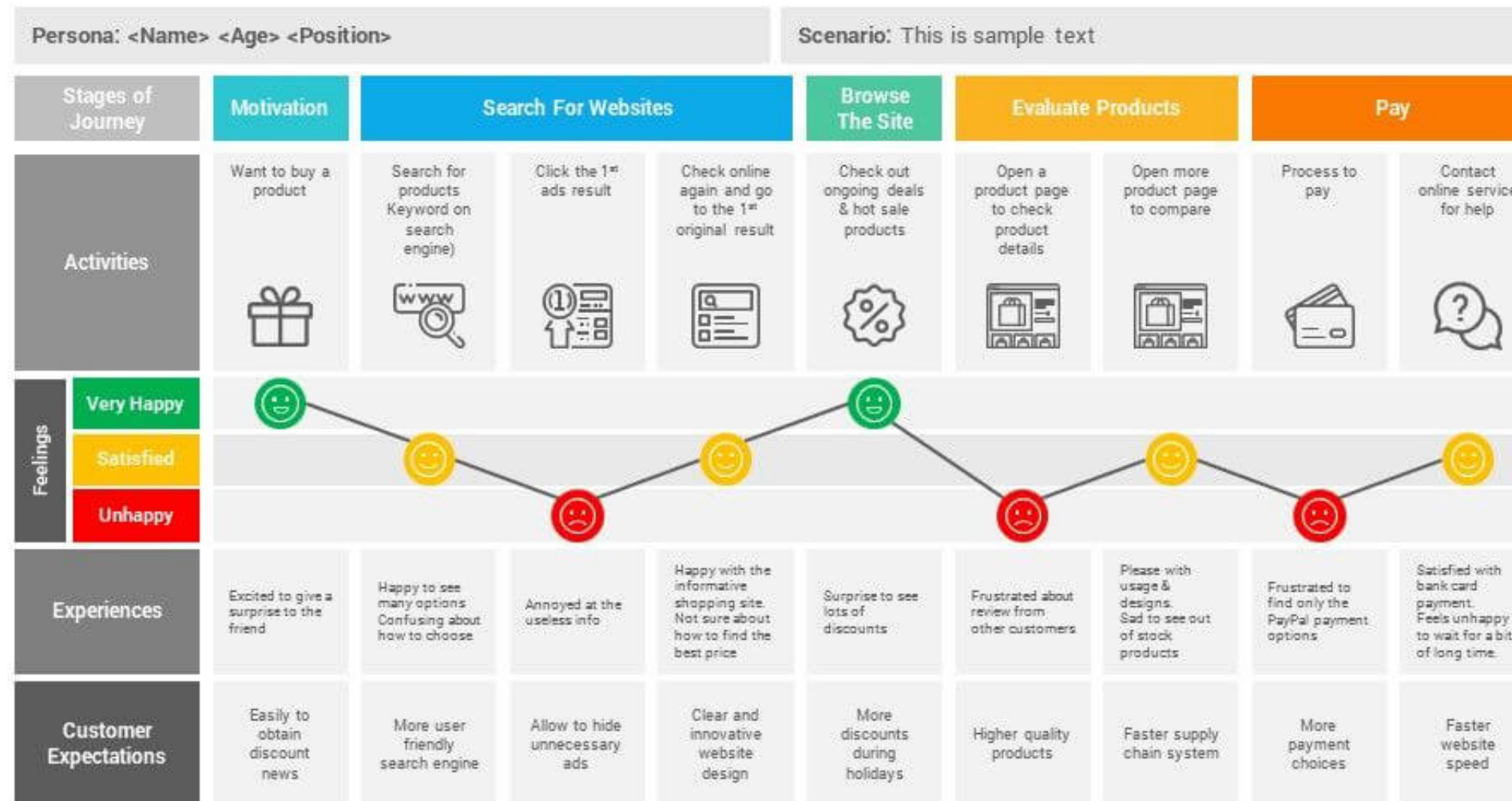
Interventions

(We found the customer **everywhere**)



Maps create **situational awareness**

# An organization is: **everything, everywhere all at once**



It's **not** a customer journey ...

Step 2:



# Insights, importance and needs

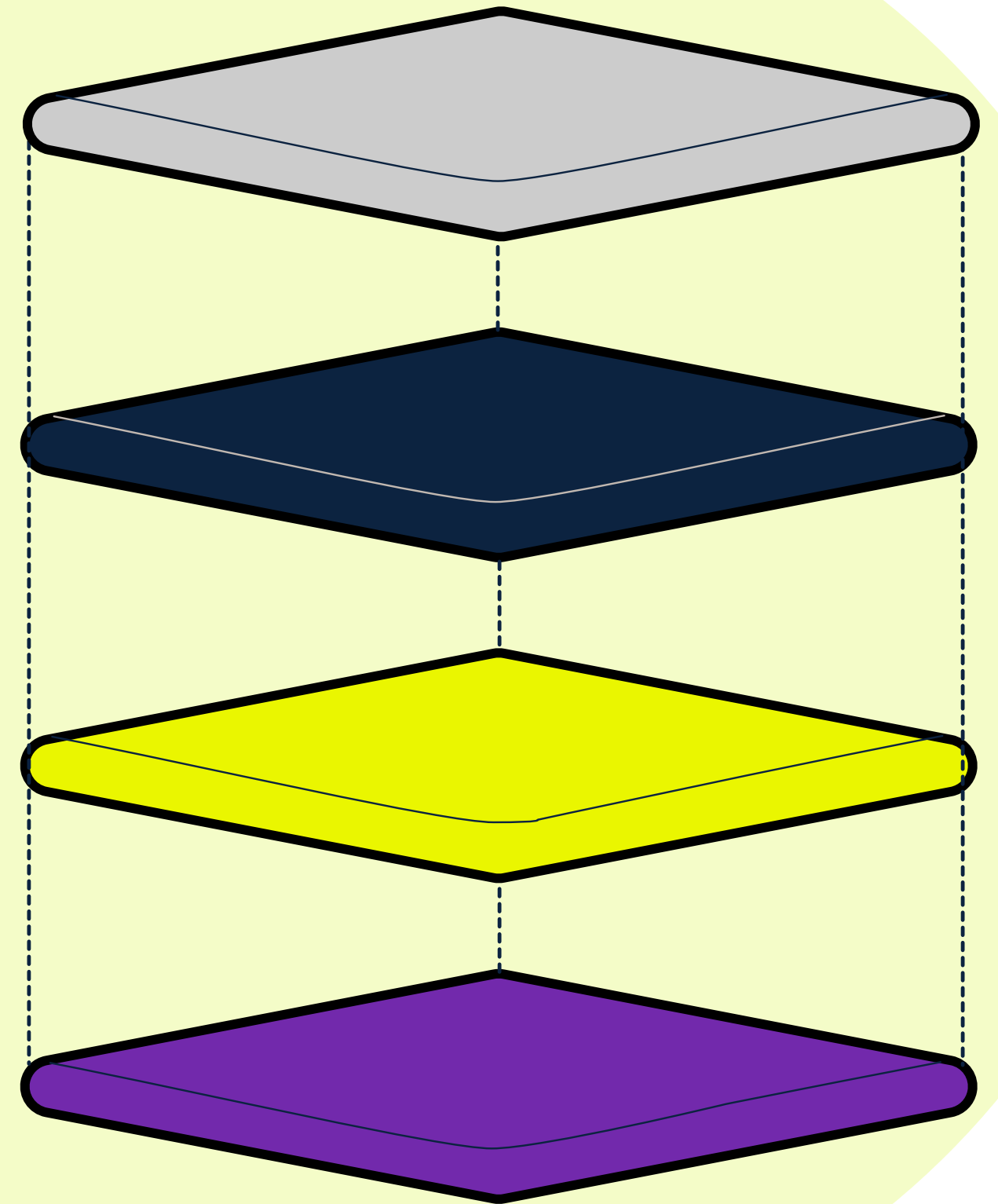
The map:  
what does  
'the customer'  
look like?

**Experience**  
& execution layer

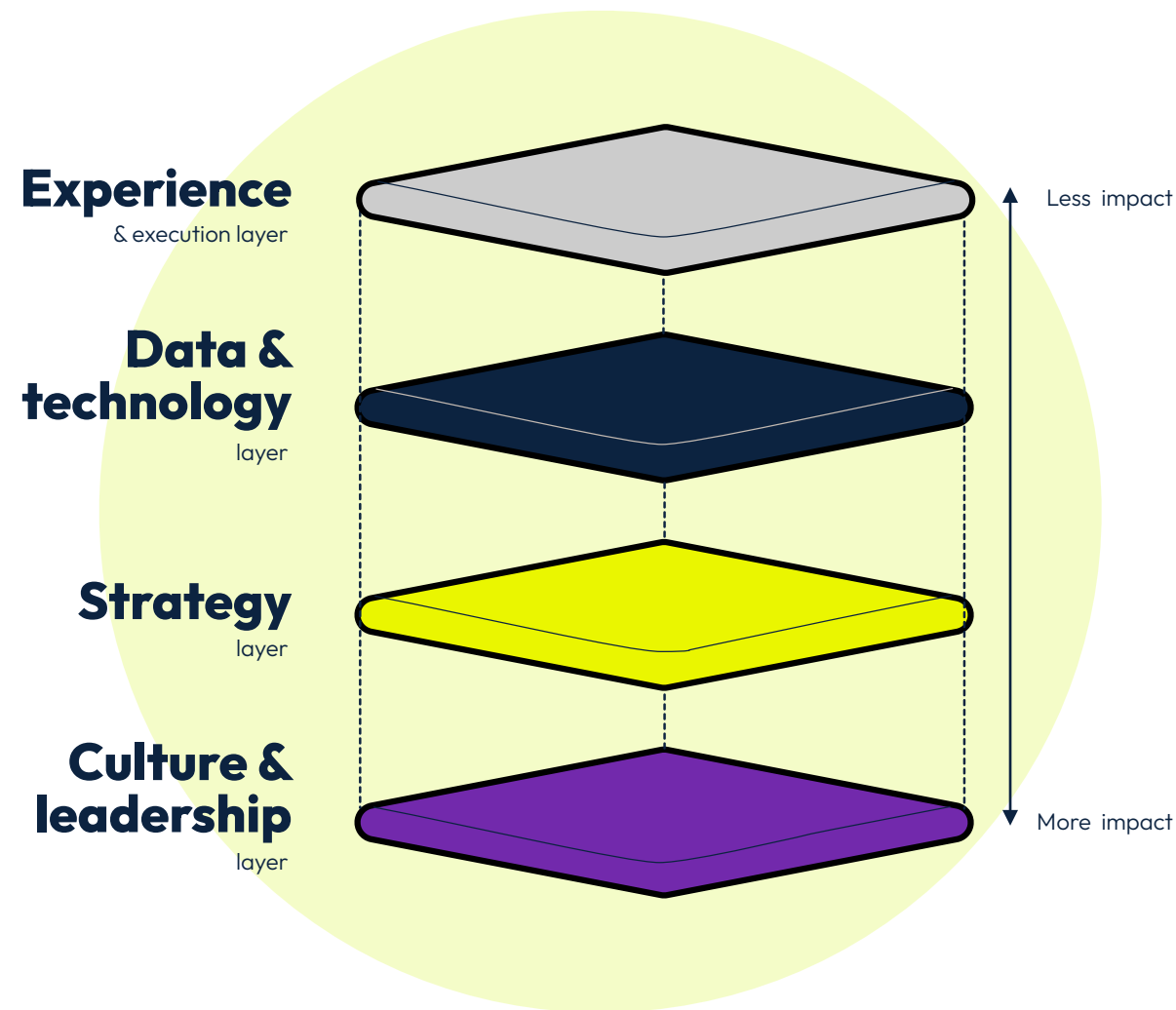
**Data &  
technology**  
layer

**Strategy**  
layer

**Culture &  
leadership**  
layer



# Generalized **layered map of the organization**



Experience  
**Activation**  
Reaching out to activate people (e.g. a campaign).

Technology & data  
**Technology**  
The technologies and platforms we need to serve our customers and the business.

Strategy  
**Customer**  
The ability to understand the customer using them as a strategic resource.

Culture & leadership  
**Culture**  
How is work and mindset centered around the customer?

Experience  
**Response**  
When people come with a need (e.g. customer service center).

Technology & data  
**Data**  
The data supporting better discussions, decisions and measurement with the customer at the center.

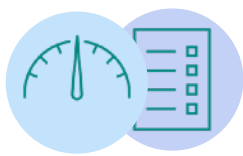
Strategy  
**Customer-2-Business**  
Creating the narrative and measurement for the line-of-sight between customer and the business.

Culture & leadership  
**Leadership**  
Governance, commitment and sponsorship of the customer approach.

Experience  
**Product or Service**  
Offering the customer continuous service through a relationship (e.g. a product or app)

Technology & data  
**Artificial Intelligence**  
How and where should our investments in AI support what value (efficiency / new value streams etc.) produced other places in the organization?

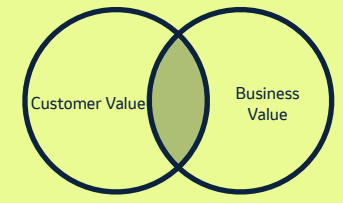
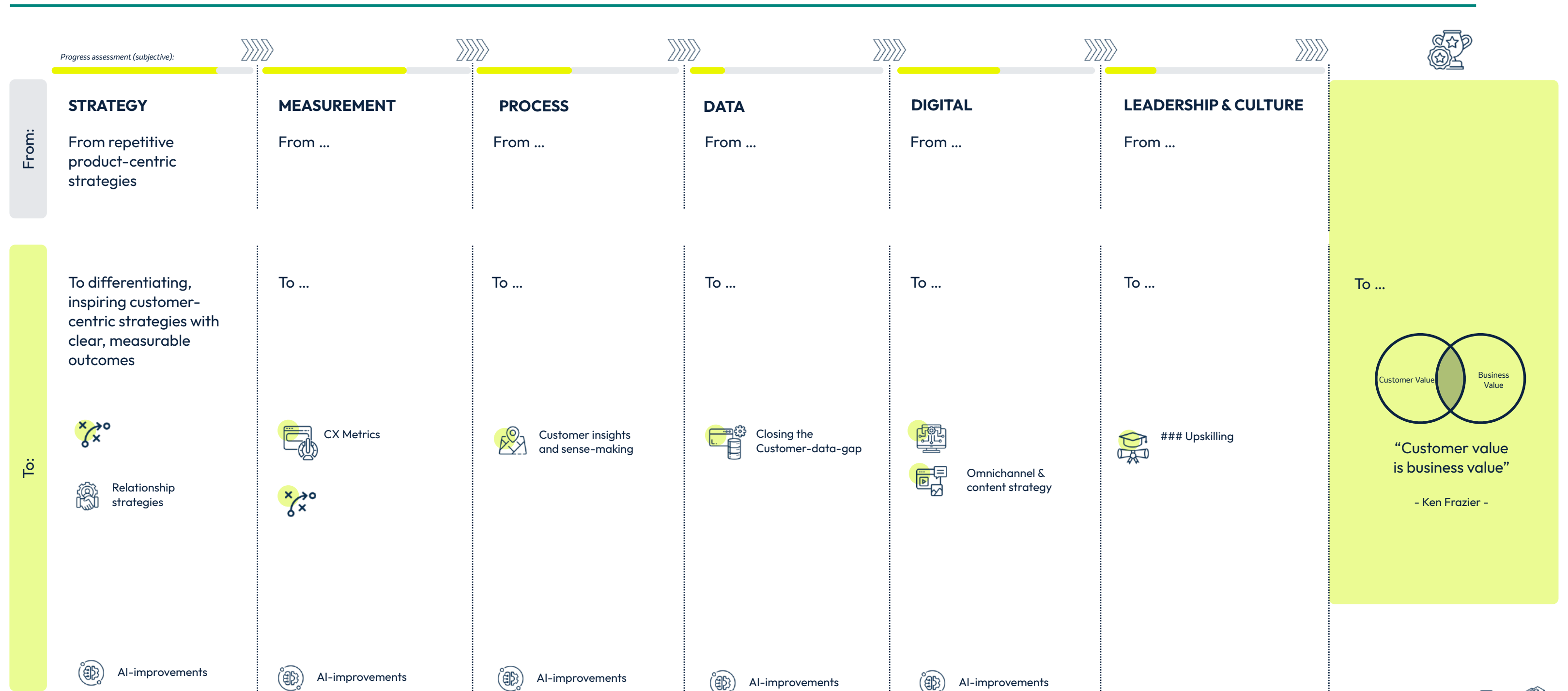
Culture & leadership  
**Ways-of-working**  
Working together in a way that supports the team's ability to engage with, learn from and respond to the customer.



What will be different:

# CUSTOMER TRANSFORMATION

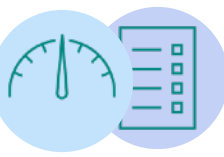
Initiatives already existing or in development where we are hoping for a continued or even better partnership



“Customer value is business value”

- Ken Frazier -





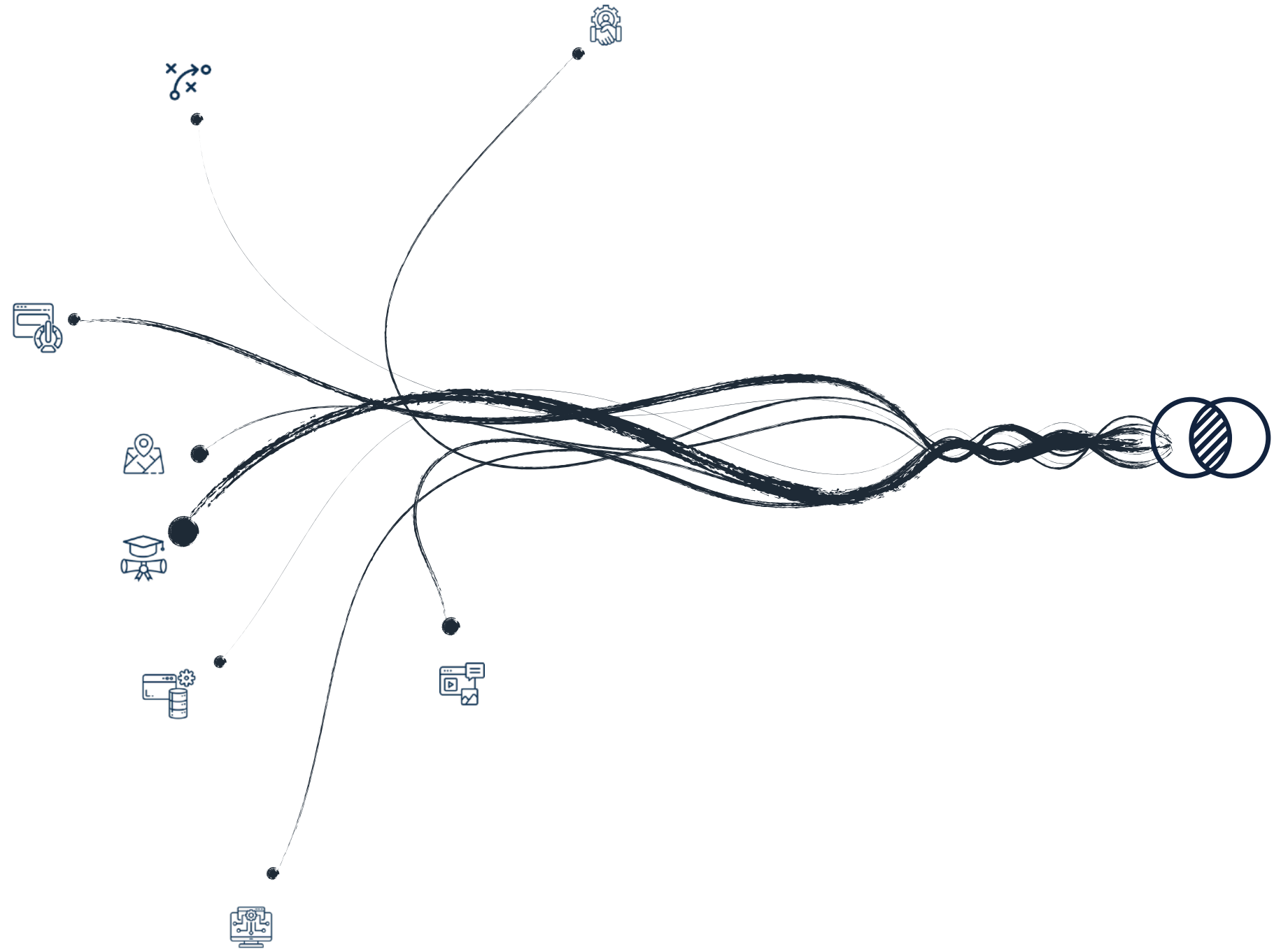
# Arriving at the transformation

Connecting our processes, capabilities and people through a clear customer narrative and a direct line-of-sight from our engagements, to customers' needs and business impact.

We need to hold our capabilities accountable to driving differentiated experiences for our customers.

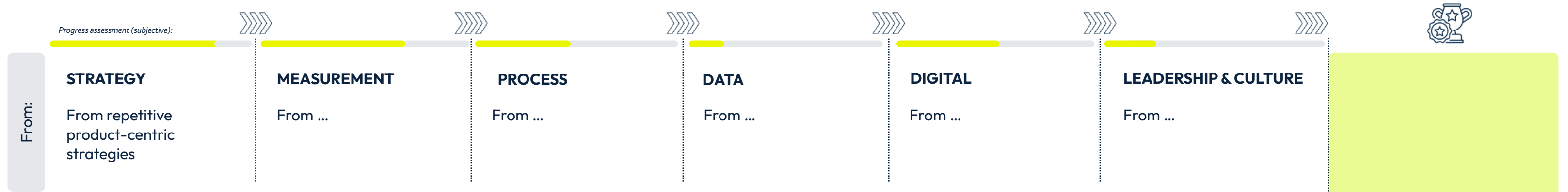


Making our cross-functional teams customer-centric is like putting a Ferrari engine into a Fiat. The whole rest of the system (our capabilities) need to be as customer-centric as the strategies, plans, campaigns and engagements we want to make.



What are we trying to achieve?

# A STRATEGY FOR EACH OF THE AREAS



We answered withing each area:

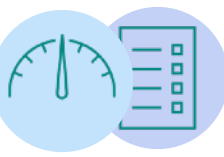
- 1. What progress is our company trying to achieve?**
- 2. Who are the internal stakeholders?**
- 3. What progress are they trying to achieve?**
- 4. What is the stakeholders change in behavior we want unlocking the progress?**
- 5. What is our value proposition to achieve this behavior change?**
- 6. What comptencies and capabilites do we need to deliver on the value proposition?**

# A now-near-next roadmap



**One more thing ...**





How do we hold our capabilities accountable?



# Using Objectives and Key Results

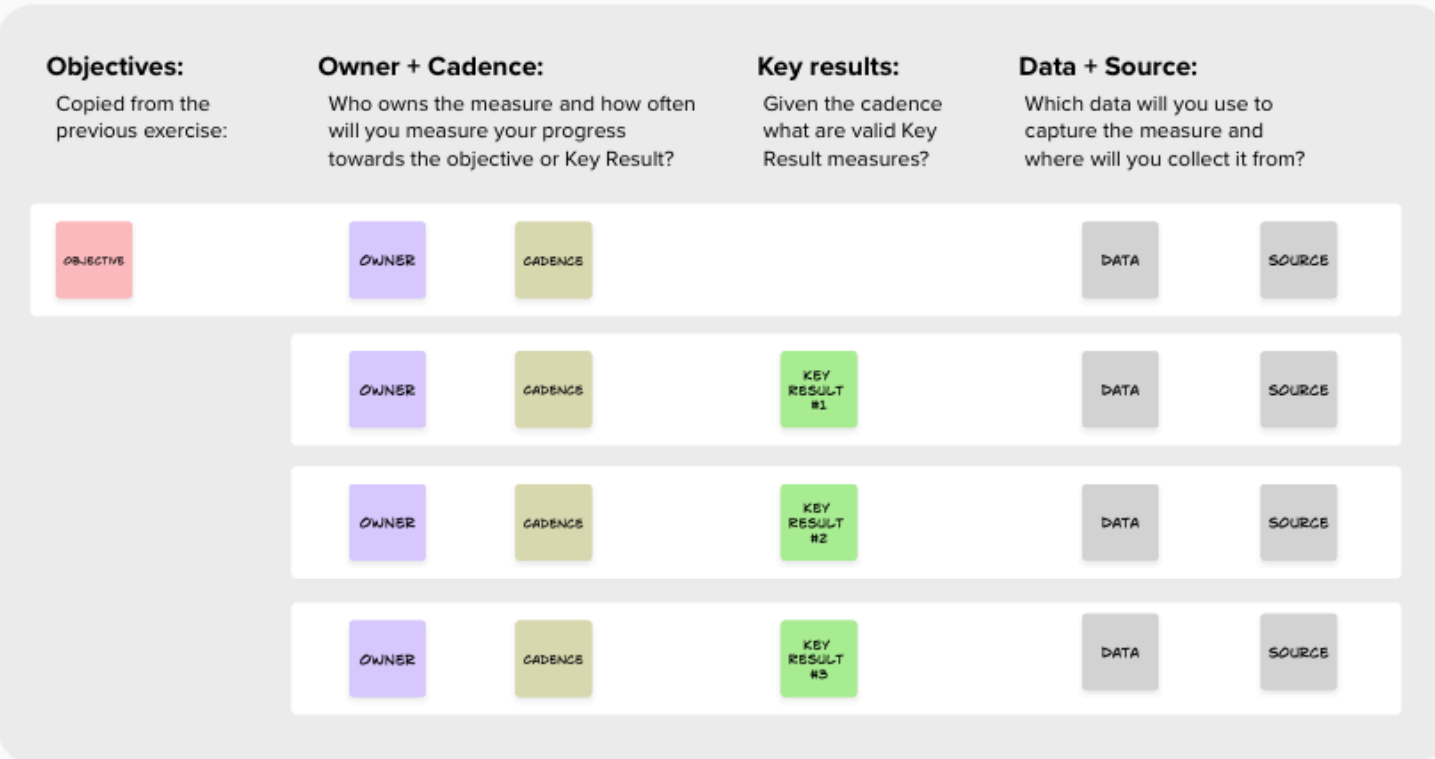


## Bonus: Getting your Objectives and Key Results [OKRs]

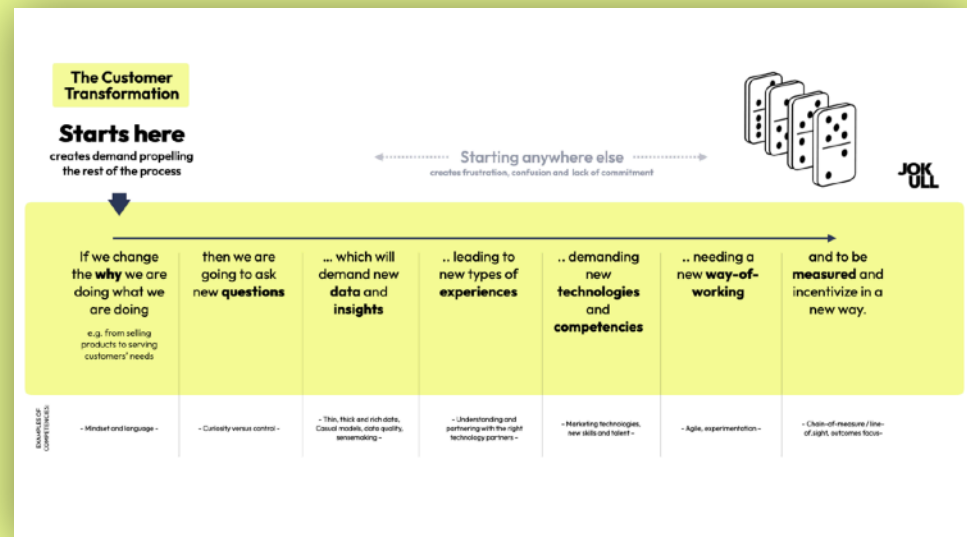
EXERCISE #4: IDENTIFY YOUR OWNERS, MEASURES AND DATA

With your shared Objectives set, let's move on to finding how to measure them using Objectives and Key Results [OKRs]

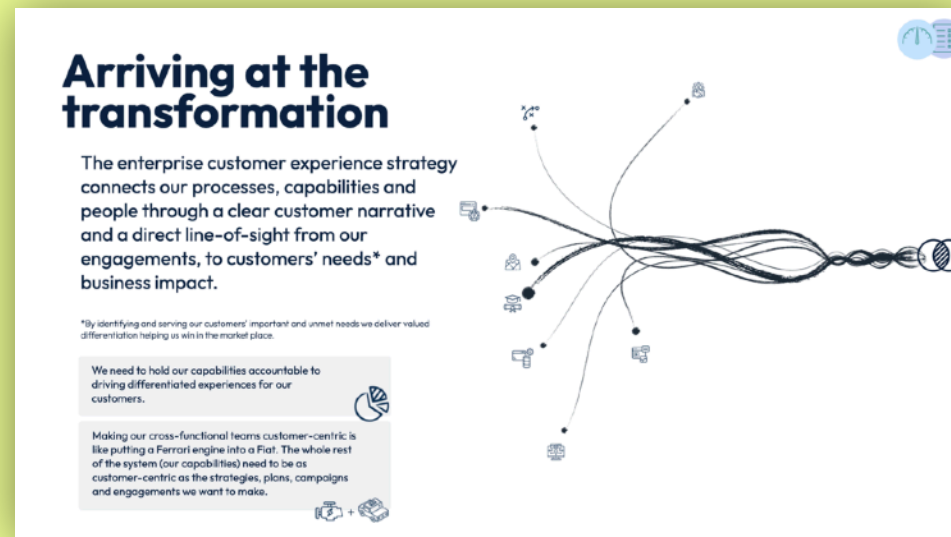
If you are new to OKRs find and read about them here.



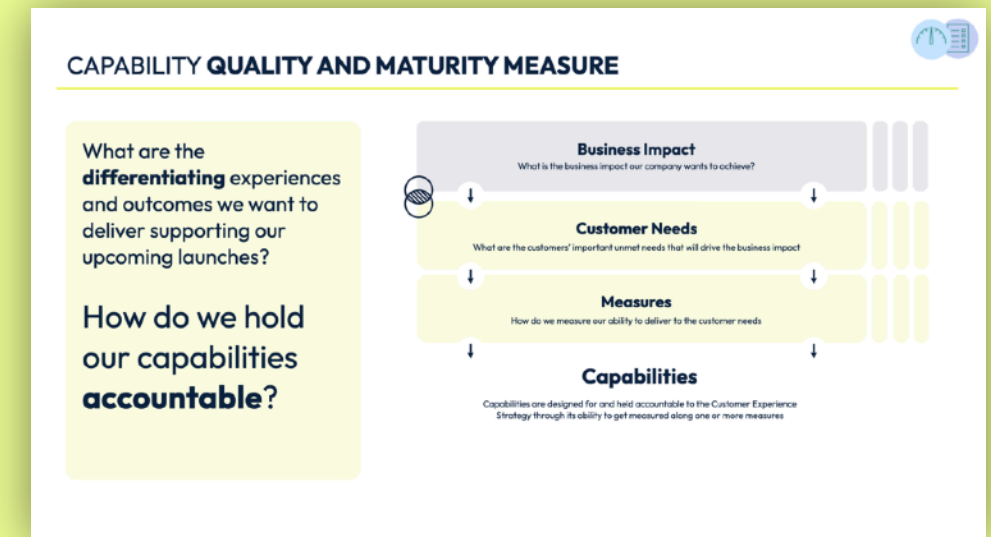
# A Customer\* Transformation



**1. Create the demand for change**  
By changing the 'why'.



**2. Create the logic**  
Tying it all together



**3. Create the measurement**  
Creating incentives motivating action