When the Partnership becomes the journey.

Helping Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

TU Delft PHILIPS

Master Thesis by
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Colophon

Master Thesis:
When the Partnership Becomes the Journey:
Helping Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

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Content

Introduction

The value of customer relationships appears to be a hot topic at the moment as companies need to move from competition to collaboration, or how I will largely refer to: from transactional to relational. However, the value which current customer relationships generate is far from the claimed collaboration. For many years, transactional relationships kept companies in a stable comfort zone with easy cash flow, measurements and ongoing linear chain processes. However, they need to survive, but large corporates might find difficulties in acquiring new approaches to their relationships but start recognizing that their internal operations may be the key reason (Junginger, 2017).

Looking at my personal motivation towards interactions and relationships between people, I see customer relationships not as on the interaction between companies but people. Although the word “customer” is largely used along with the thesis because of the Philips terminology, a relationship between people from different companies - a partnership, should equalise both sides of individuals as partners. Removing the roles of customer and provider helps to step out of the unwanted transactional approach. The same happens with customer-centricity. Although customer centricity seems to be the saving boat, companies struggle to apply it. Because it is not the company itself that needs to be customer centric, but the employees.

To overcome the transactional approach of Account Management, Philips needs to understand that there are external factors to account managers that influence the behaviour of these and consequently, the outcomes of the customer interaction. Incentivisation on new deals and commercial education takes a big role within the context but this project will focus on the education side - training.

Companies deliver education to their employees so that they perform under the assumed company strategy. In the case of Philips aiming to improve customer relationships, the organisation provides training to its account managers to sell better.

This project aimed to develop a solution space to reframe the approach, knowledge and behaviour gaps in the dialogues between Philips Account Managers and Philips customers - hospitals.

6 core contributions:

1 - Help stakeholders see and act.
Let the project stakeholders see what is stopping a better relationship from happening. Sometimes these stakeholders are part of and blind to the problem. Moreover, the project acts as a trigger to bring action to an urgency. Often, companies recognise the problem but struggle in taking action.

2 - Micro level research to understand blindspots .
Big corporates go big, with strategies and big transformation programs. However, diving deep from a macro into a micro-level (account manager and doctor) can bring much more understanding on why things don’t work because a smaller context allows experimenting quicker and sharper.

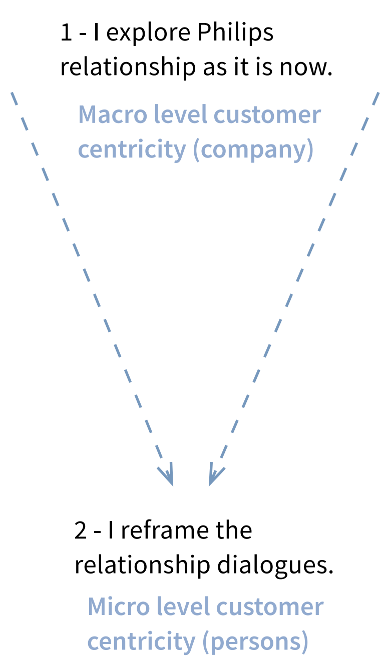
3 - Personal relationships empower.
Transactional is the approach between companies. Relational is the approach between people. Transactional relationship puts money in the centre. Instead, personal relationship put other things in the centre (not money) such as common goals or meaningful experiences.
If companies take inter-organisational relationships as relationships between people (not companies) they will be able to remove the monetary value of the centre.

4 - Customer centricity doesn’t centre.
The project also shows that pushing customer centricity can be vague and uncertain. Especially for big corporates where the definition of customer centricity stays in the macro level, the level where relationships happen between companies. However, taking the perspective that relationships are made of people, a sharper understanding of customer centricity in micro levels helps to move on to the desired culture.

5 - Pragmatism for customer centric relationship.
Education that stays at a mindset level might not move the students forward when the knowledge should be applied in the interaction with another person.
To put interfaces and pragmatism between the interaction stakeholders helps to drive this to the desired path. Therefore, the learnings are better understood and easier to reflect on since the tools will explicitly reflect the behaviour taken.

6 - Designer supports account managers.
From a personal point of view, I have seen my role as Philips employees empathiser (in the mentioned micro-level) to make sure that the desired outcomes can smoothly be welcomed by account managers. I have been the bridge between the assumed desired future and the present. Sometimes people can feel designers tell them what to do or change, but I hope my contribution consisted in understanding from them, what is best to do.

For the reader.



This report takes the reader through the process undertaken in order to move from the overarching question to the solution implementation. This path is divided into mainly two parts one after the other.

The first part is “Problem exploration” where the project starts by introducing the situation at Philips at a Macro level. There, the situation and the problem given are described. To tackle such a wicked problem (improve customer relationships), chapters 3 and 4 show the diving process towards the micro-level (Account Manager and customer). Before arriving at this micro-level, it is important to realise that Philips first priority in driving customer-centricity across the company is a challenge that this project tries to approach from this micro level. Moreover, “customer-centricity” is largely used across the report, but I understand it as the umbrella for something else. Customer centricity is very used at Philips and is the core of Philips first priority and ambition, but this project tries to articulate it into something more pragmatic. Moving Philips employees and the current relationship from today to the future requires a journey, the change doesn’t happen overnight and in fact, it is not possible to know what are we exactly moving towards.

However, it is possible to design the means to know it. This will be introduced in chapter 5, which kicks off the solution exploration and the second half of this report. In this part, “When the partnership becomes the journey” delivers sense by introducing “The partnership Journey Toolbox” the enabler of a relational solution that helps to sustain stranger relationships (customer-centric ultimately).

The report closes with a self, process and solution reflection to invite the reader to take inspiration for other journeys.

Acronyms & Glossary.

Account Manager
(AM)

Philips sales employees. They take care of the sales relationship with Philips customers - hospitals.

Long-term Strategic Partnership
(LSP)

Philips long term agreements with their customers.

Regular Account

Any other customer that sets a regular agreement with Philips.

Customer Centricity

(CC)

Taking into account the needs of the customer as starting and central point of any decision or proposal. (3.5)

Market/s

The division of countries and regions that Philips uses to make business around the world.
E.g: DACH is one market and includes Germany, Switzerland and Luxembourg.

District

Divisions within the Markets where Account Managers work.

Customer Experience

(CX)

A program within Philips advocating and accelerating the companies transformation to customer-centricity.

Quadruple Aim

4 key aspects to understand the needs of any healthcare ecosystem in a holistic way. It is a circle with 4 quadrants (patient experience, staff experience, health outcomes improvement, costs reduction) created in the US by *Donald M. Berwick.*

Partnership

The collaboration of two or more owners, the conduct of business for profit (a nonprofit cannot be designated as a partnership), and the sharing of profits, losses, and assets by the joint owners.
-Uniform Partnership Act

Chapter 1

Project

The chapter describes the challenge presented by the company together with an explanation of the need and relevance for the current Philips context.

1.1 Context & Ask.

The project is in collaboration with Philips, and it is giving support to Customer Experience program.

The company is transforming from a consumer electronics to a healthcare company (ref).
Therefore, moving from transactional business models to long-term strategic partnerships is the present and future aim for continuously support Hospitals.
The strategic and innovative focus of Philips lays in the "Quadruple Aim" *(2008, Donald M. Berwick)* where they value whether costs are being reduced, if outcomes are improved, if physician work experience is improved and, above all, if patients are receiving the best care.
They manifest that "There is always a way to make life better" with the mindset of patient centricity and understanding that the troubles of healthcare professionals, are the troubles of Philips as well.
Having this in mind, Philips wants to go hand in hand with Hospitals in order to understand patient and healthcare professionals' needs, and ultimately, deliver better care to people. However, they wonder, how can we build this desired trusted relationship? What is the contribution of Philips beyond selling "stuff" exclusively?

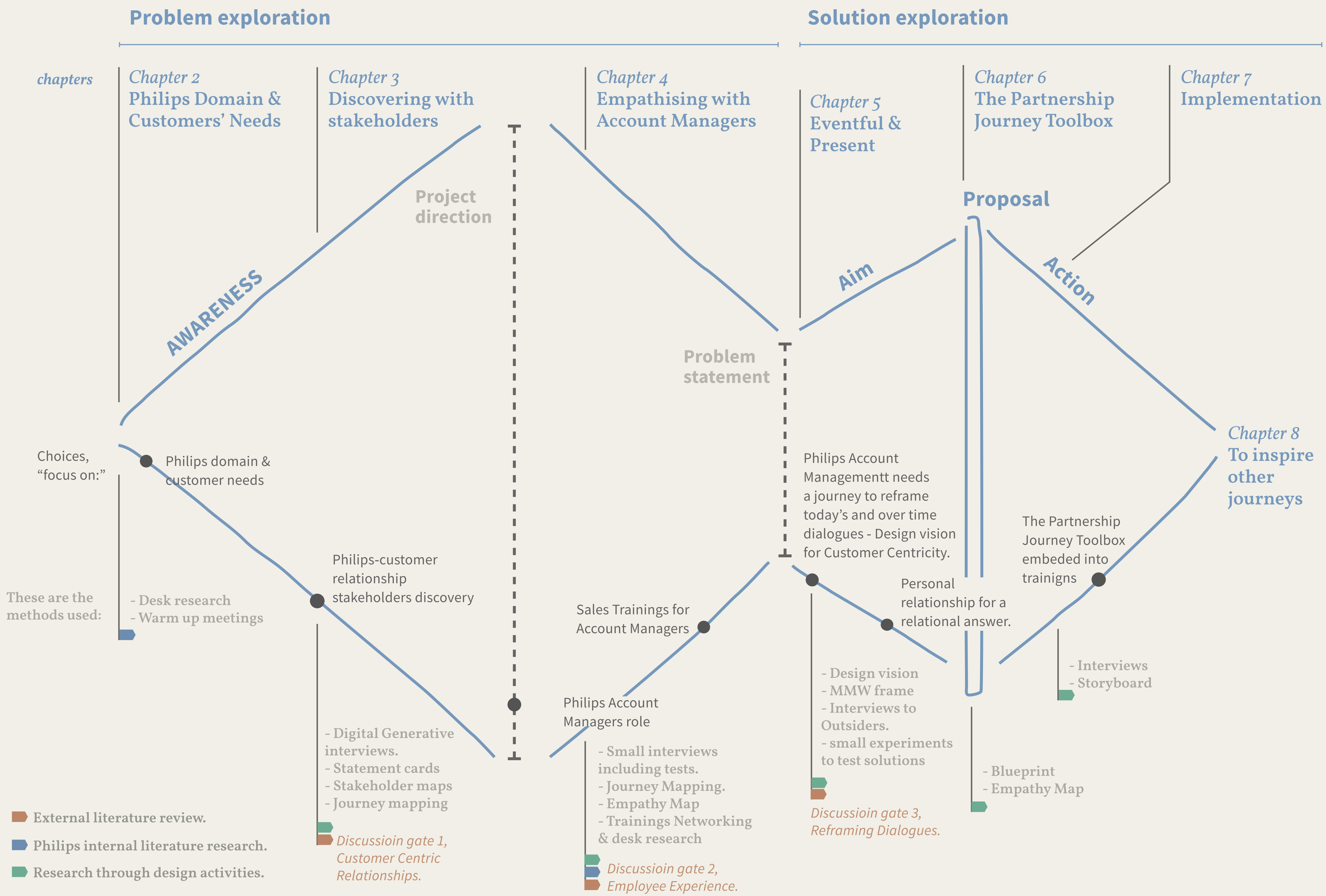
Within this context, there is the Customer Experience program run by 2 persons mainly but with a huge mission for the company. One of the two is my supervisor and buddy at Philips, Hanneke Hoogewerf.
The Customer Experience program tries to undertake various projects with strong use of design capabilities to show what transformations can be done internally to support Philips strategy towards driving customer-centricity.
The program is seen as key to accelerate and understand better the assumed transformation within Philips.
Frans van Houte (Philips CEO) made it very clear that putting customer first is the first priority for the company. (ref)
This priority is bringing iniciatives all over the company, and its the program Customer Experience the one making sure they all follow the customer first manifesto.
However, rooted and ongoing practices rub with each other. Marketing and Sales (and probably more) areas are also looking at customer needs. Therefore, we are in a moment where everyone is aware about the change, but it is very low definition which is/are the right path/s. In my view, this context felt very exciting but also complicated to swim.
My project is one more of these initiatives, and I met others on the way. I learnt from them, and I have seen how similar or different were to my ideas, and therefore, why my proposal could have a valuable space.
Taking into account that Philips is so big, my findings and proposals do not aim to be the ultimate truth, but a new perspective and approach to the situation as I have observed it.
An impact at a micro-level that might give light to the meta-level.

Given this context, the overarching research question I attempted to answer is:

How can Philips build a more customer-centric relationship with its clients Hospitals?

1.2 Project Approach

The aim of this project is to help Philips improve the relationship with their customers-hospitals moving out from the current transactional approach.
As I mentioned in section 1.1, the was no specific as and the project was very explorative.
In this sense, the project approach is mainly split into *Problem Exploration* and *Solution Exploration*, structuring the steps into the Double Diamond approach (Bánáthy, 1996).
However, I adapted the phases of the double diamond from *Discover, Define, Develop, Deliver,* to *Awareness, Aim, Proposal, Action* to fit the process to the needs of the project:
Due to the fact that the project is explorative, the aim of *Problem Exploration* aim is to navigate the uncertain situation to get a project direction and end up with a problem statement.
In the second half of the diamond, the project explores the solution from what is needed instead of the problem explored, to what Philips is going to do to take the proposal forward. I bridge chapter 7 with 8 since the project has a continuity within Philips. Moreover, the project closes with a discussion on the contribution of the key topics (customer relationships, employee experience and reframing dialogues) beyond Philips.



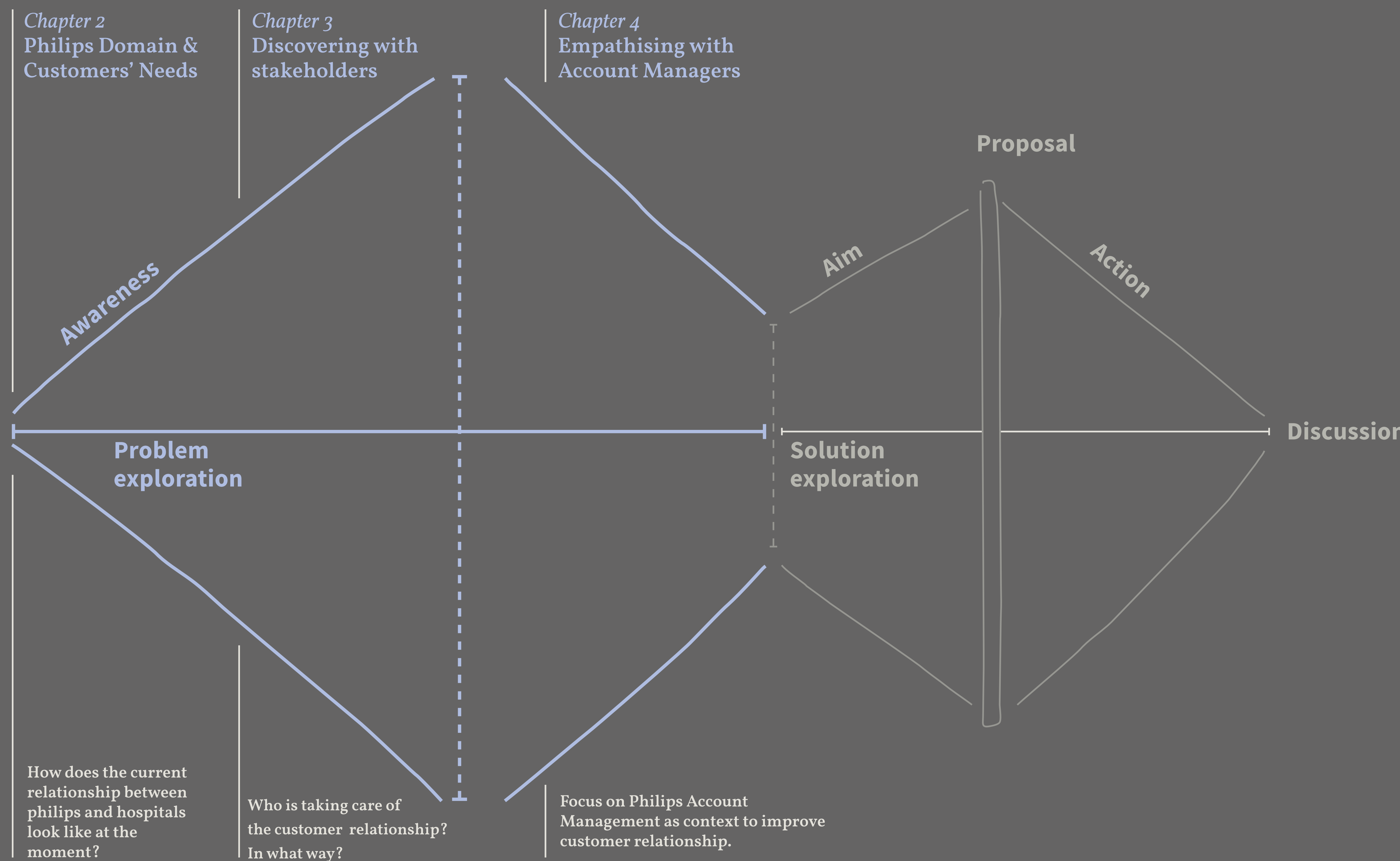
Problem Exploration

AWARENESS

In the following 2nd, 3rd and 4th chapters I will expose the first diamond of the design process.
I kick off this diamond starting to explore “How can Philips build a more customer-centric relationship with its clients Hospitals?” and will be closed with the problem statement.

In chapter 2, I explain the Philips context as it is now in regards to customer relationships. This part was done via desk research because my role was more on being observant and warming up for the next step.
With the basic knowledge from chapter 2, I choose to start my research on involved stakeholders in the customer relationship. I close chapter 3 with the decision of focusing on Account Managers after giving an overview of the current situation as I have seen it. Chapter 4 converges into the role of Account Management within Philips leading to the problem statement.

These are questions and choices that each chapter brings:



Problem Exploration Insights overview.

From Macro (Philips - Hospital relationship)

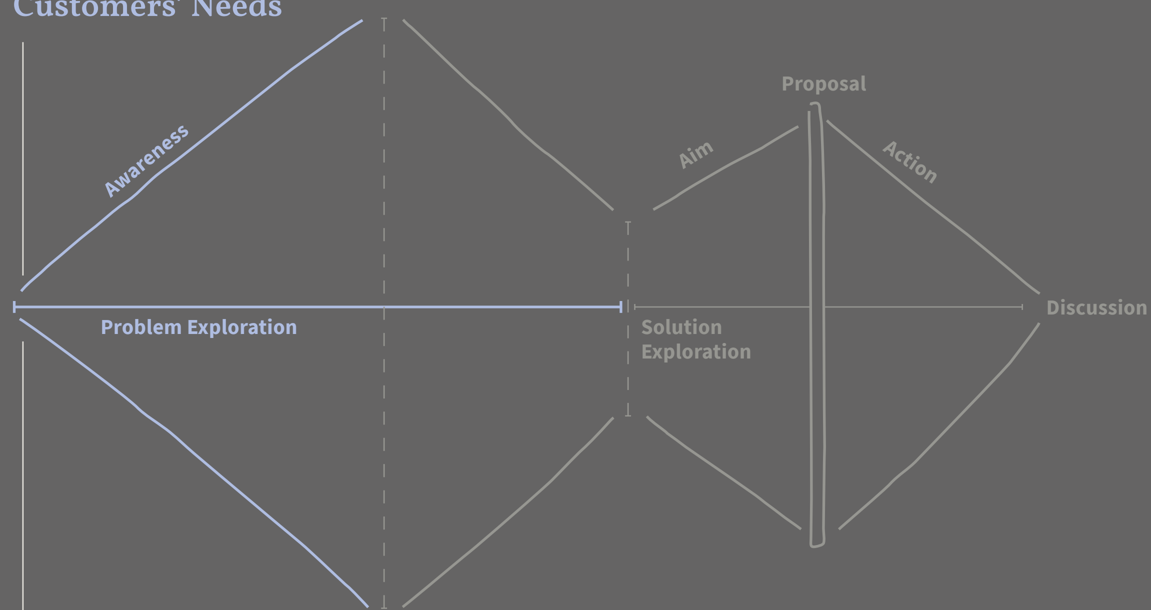
To Micro (Account Manager - Customer relationship)

Level:	Exploring:	Stakeholders & Method:	Insights:	Take-aways story line:	Next:
Key Ideas from the Context as Given Chapter 2  	- Warm up and scope. - Philips status quo (problem as given)	- Customer Experience Program employees. - Design strategists ----- - Interviews (where I had an observer and listener position) - Philips internal literature research.	Philips is healthcare provider acting as a vendor. However, customers expect Philips to act as a partner instead. Philips finds that its customer retenetion is very low. Together with the customers' expectations, alarm is on: Philips wants to move out of the current transactional relationship and "To Put Customer First" becomes the first priority for the company. The organisational structure and the current relationship roles are less around customer centricity and more around sales. The relationship journey involves siloed stakeholders along many years.	- Low customer retention and ask from customers make Philips "Put Customers First" - Philips needs to transform the whole company towards customer centricity. However, the how is unknown.	Towards chapter 3 *Who is taking care of the relationship at the moment? In what way?*
Top Context Insights Chapter 3  	- Who is taking care of the relationship at the moment? In what way? See 3.1 for method especific questions.	Stakeholders discovery *(most involved in the relationship Philips-Customer)*. See section 3.2 for full participants overview *(10 in total, eg: market leads, customer delivery manaers and account managers)* ------ - Generative design approach interviews, 3.1.	**PARTNERSHIP YES, BUT WHAT PARTNERSHIP?** *Unclear use and meaning of "partnership" between Philips employees blurs customer centricity.* **ROLES AND DAY TO DAY MISMATCH.** *Mismatch between "by definition" - expected roles, and actual work within the Philips-customer relationship.* **CAN'T GET TO THE OTHER SIDE.** *Governance (many steps) and roles's habits (being territorial) slows down the desired transformations of the relationship.* **CUSTOMER CENTRICITY DOESN'T CENTRE.** *Customer centricity can be too vague for the whole Philips context since it involves many different stakeholders and intentions.*	I decide to engage with the assumed most involved stakeholders in the relationship, since the relationship is done by the people and not by a company. <u>4 Top Context Insights influence the interviewed stakeholders to follow Philips's ambition:</u> - Roles mismatch. - Broad customer centricity and vague partnership meaning. <u>At the relationship level:</u> - There is no after-sales relationship. <u>Focus on AMs because:</u> - AMs way of taking care of the customer relationship is selling-transactional. - AMs keep regular interaction with customers. - AMs are expected to take care of the relationship. + The spotted Top Context Insights are also found in Account Management.	
5 Key Relationship Moments Chapter 3  			Conversations AM and customers aim to ensure early sales, not long term collaborations. Stakeholder Management is not enough to break the silos. Before and after in the relationship dynamics after contract signing. Unclear Account Management role in the "after-sales" relationship The "after-sales" relationship is very much on deliverying. The roles involved in this miss AMs		Towards chapter 4 *What are the current interaction gaps between an AM and a customer?*
AM - Customer Relationship Pains Chapter 4 	- What are the current pains of the interaction between an Account Manager and a customer? (4.3) > From this point on, both problem and solution were explored together through design activities (experiments). After chapter 4, there is a solution key decisions overview.	- Philips Account Managers from 2 markets (UK and DACH). 4 AMs in total. - Philips District Managers, 2 in total, one from UK and one from DACH. ------ 2 General Methods: - Generative design approach interviews, 3.1.	A. Customer knows that the conversation with AM will be transactional. B. From non to unclear added value in the relationship. C. Different rhythms between AM and Customer. D. Unclear how to move forward. E. "Closing a deal" or "no urgency for the customer to buy" means slowing down the interaction. F. AM evaluate and create urgency for the Customers to buy soon. G. Privat and Territorial Account Managers weaken communication and trust.	- There is no synchronisation between Account Managers and Customers in terms of: Time: both follow different rythms Knowledge: topics mismatch Behaviour: soft skills do not support customer centricity. Outcomes: both parties ahve different intentions and (AM intentions are transactional).	
AMs' training Chapter 4 	- What are Account Managers learning? (4.5)	- Experiments with draft proposals: "The agenda maker" "The Parnetship Model Canvas" "Look at trainigns together"	Account Managers current transactional behaviour is given by 2 external factors: expected outcomes and education. AMs training are commercial. AMs training only focus on the deal moment. Despite receiving training to be more customer centric, AMs still fall into the transactional behaviour when meeting the customer.	- Account Managers receive training to be more customer centric. However, they struggle in applying the theory when meeting the customer and still behave transactional.	Towards chapter 5 What is needed? *To build the path between the current transactional situation towards the desired customer centric relationship.*

Philips internal literature research.
Research through design activities.

AWARENESS

Chapter 2
Philips Domain &
Customers' Needs



How can Philips build a more customer centric relationship with its clients Hospitals?

Chapter 2

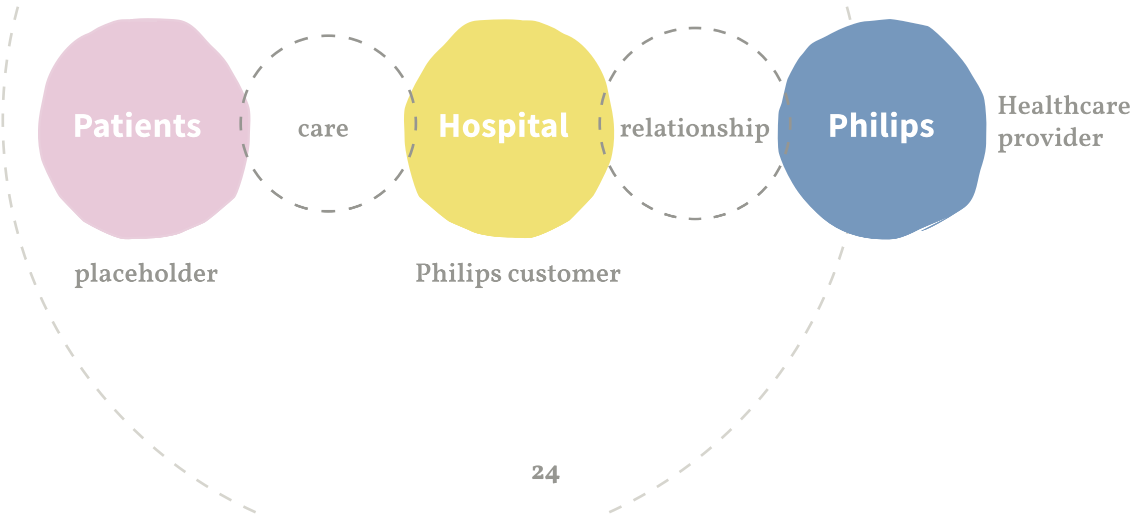
Philips Domain & Customers' Needs

This is a warming up chapter where the general situation of Philips and the problem as perceived are explained.
The approach consisted of desk research. For the desk research, I looked into various Philips materials such NPS, Philips Business System Booklet and the Customer Experience Manifesto.

2.1- Philips as a healthcare provider.
2.2- Philips "Puts Customers First".
2.3- Customer Experience from Philips and from the customer.

2.1 Philips as a healthcare provider.

We, the people, go to the hospital as patients to solve our healthcare problems. There, we find a whole structure and service built to provide the best care.
In this sense, hospitals need to be equiped in different aspects as the "Quaduple Aim *(2008, Donald M. Berwick)* shows *(patient experience, staff experience, better outcomes, reduce of costs)*. To do so, hospitals count with external organisations and Philips is one of these.
Philips is transforming to become a healthcare company.
The company provides healthcare equipment, technology and innovation to hospitals all over the world.
What Philips provides can be understood in the following 3 levels:
First one, Philips is mainly focused on providing products: MRI scans, ultrasound, Image-guided therapy, etc.
The second one, Philips is a solutions provider and can help hospitals to equip various areas with not only equipment but software and workflow improvements.On a third level, there is Philips providing change management solutions where they help the hospital to change more holistically.
At the moment, the first level described is the most common one where 80% of Philips customers purchase products. The company wants to move towards level 3 because the current relationship Philips is establishing with its customers (hospitals) is very much transactional and the value is focused on the product sold. In other words, the relationship is sales centred.



2.2 Philips "Puts Customers First".

Philips wants to move out of the mentioned transactional approach by moving towards "Customer Centricity".
To do so, the company's first priority is **"To Put Customers First".**
Why?
Philips wants to increase the **low customer retention** that is suffering for some years already. They find that basing the relationships with their customers with products is not valuable anymore. NPS results and customers' feedback set the alarm:
"There is no connection to the company for some reason.
You never see anyone from the company, the only time is when you need to buy a new X-Ray machine and then we get into the discussion and we buy a new machine and that's it, for the next 10 years there is nothing, there is no after-sales, nobody to partner with".
- Philips Customer.
Moreover, all the companies are capable of providing top technology. Instead, there are a lot of other factors that influence the relationship and the customer's choice in staying with Philips or going with other companies *(Dr. Brescó)*.Philips has almost 80k employees and the transformation I am mentioning in putting the customer first affects the whole company in a way or another.

> *At Philips, we believe the customer always comes first. Priority number one, above all else, is our customers' success, their satisfaction and trust in the Philips brand.*
>
> - Customer Experience Manifesto

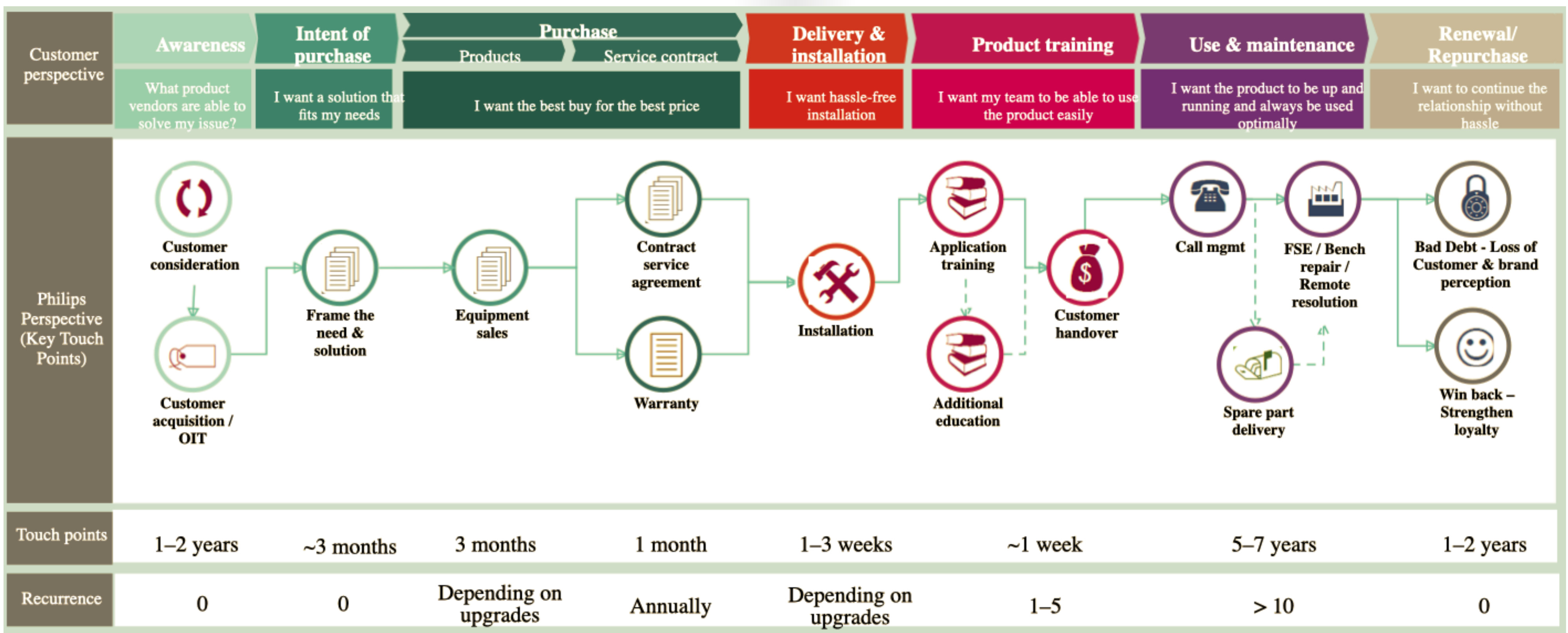
The Customer Experience program acts as a central point to drive customer centricity and makes sure that the different initiatives follow the customer experience manifesto. Philips transformation aim is to *"Stay leader in HealthTech by increasing customer share through consultative partnerships"* also, *"Drive integrated solutions that deliver on the Quadruple Aim"*, because the Quadruple Aim (mentioned in 2.1 section) holistically frames the goals of hospitals, and Philips puts the success of its customers first.
Delivering on the Quadruple Aim means build long-term relationships where the time frame is extended (7-15 years) and there is also consistent engagement. This is because the stakeholders need to build business cases that can deliver solutions (all the quadrants) and not only products.

Although the overarching research question is:
How can Philips build a more customer centric relationship with its clients Hospitals?
Philips uses "customer centricity" to define the ultimate goal. But this is very broad. So if I talk about customer centricity is to refer to how Philips think and works.
However, given the problem and ambition of Philips, the project sees that the questions behind is:
Where is Philips moving towards instead?
As it will be explained in chapter 3, customer centricity works as a mindset for the whole company, but it might not me practical helping 80k employees.
In chapter 5, I provide the Design Vision for customer centricity.

2.3 Customer Experience from Philips and from the Customer.

Philips is experiencing an urgency to become more customer-centric and therefore, it is important to understand which are the current touch-points from start to end that Philips and customers go through.
In the figure below, I show the current End to End Customer Experience journey (E2E CX Journey) as defined by Philips. This journey is used to standardise the understanding of the customer jounrey through the whole company because it was perceived that the relationship and its stakeholders are siloed. It appears that the roles involved only see the stage they are involved in, “ignoring” the previous ones, but especially next ones. In this way, when a Philips employee needs to understand the customer relationship beyond its role, it is suitable to refer to the E2E CX Journey.

4 key observations:
1 · The journey is based on the needs and tasks around products and services.
2 · The stages are seen from the Philips point of view as in, what Philips does to deliver a product or service.
Therefore, I wonder if these stages also represent how a customer goes through the experience of acquiring a Philips product or wanting to partner with them.
3 · Use & Maintenance stage appears to be the biggest period with touch-points that only relate to the purchased product or service. After this stage, there is renewal/repurchase. So the touch-points between product training and renewal/purchase seem to be very few made me think that there is no clear plan to sustain the relationship during the 5-7 years of the stage.
4 · Taking this into account, the renewal moment is very uncertain. My question is, What is the customer basing its decision in continuing with Philips or not? Should this even be a specific moment in time? The truth is that customer retention is very low, so at some moment within Use & Maintenance (because the previous stages are more intense) the customer probably takes such a decision.



End to End Customer Experience Journey. Philips visual

2.3 Customer Experience from Philips and from the Customer.

Still looking at the E2E CX Journey, some customer quotes are overlapped to show their point of view of Philips the company relationship. The quotes are extracted from existing documents from the company during my desk research.

Meetings with unclear long-term purpose.

"I have been in meetings within Philips-Best location and we have exchanged ideas and explored possibilities but it always stays at testing the waters. So it seems like you are getting information from me but not really trying to partner with me and trying to do something together".
- Philips Customer.

Want a partner beyond purchase.

"Maybe Philips introduces a new software tentatively and we use it but you never get the feeling that we are really engaged with each other. There is insufficient engagement to improve outcomes for my patients or make my life easy or safer".
- Philips Customer.

Philips feels gone after-sales.

"There is no connection to the company for some reason. You never see anyone from the company, the only time is when you need to buy a new X-Ray machine and then we get into the discussion and we buy a new machine and that's it, for the next 10 years there is nothing, there is no after-sales, nobody to partner with".
- Philips Customer.

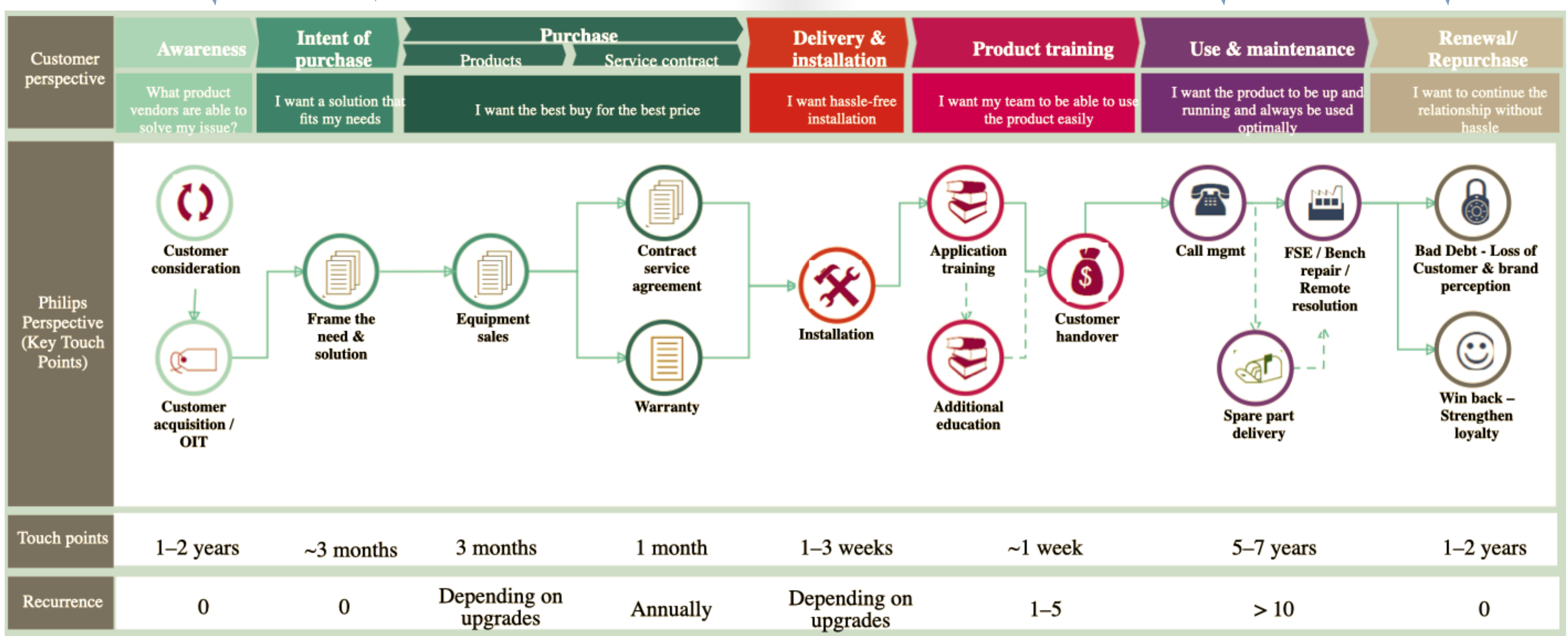
Relationship fate hanging by a thread.

"We are still a "Philips House", but only because we like and are familiar with the product".
- Philips Customer.

3 key observations:
1 - Philips is present in the purchase moment and the activities that surround that stage. This will make some customers feel disappointed if they want a partner instead of a supplier.

2 - Customers perceive uncertainty and absence during the use & maintenance phase.

3 - All the journey phases after product training are more fluffy and are not giving reasons to the customer to keep the relationship, which directly affects customers' retention and the mapped last stage of renewal/repurchase.



End to End Customer Experience Journey. Philips visual

KEY IDEAS IN THIS CHAPTER

Chapter 2
Philips Domain & Customers' Needs

Philips is healthcare provider acting as a vendor.

CUSTOMERS-HOSPITALS' NEED

Customers expect Philips to act as a partner instead of a vendor.

CONCEQUENCE

Customer retention is very low.

ALARM CREATES AMBITION

Philips wants to move out of the current transactional relationship and "To Put Customer First" becomes the first priority for the company.

BARRIER

The organisational structure and the current relationship roles are less around customer centricity and more around sales.

The relationship journey involves siloed roles for many years.

Problem as given:

The current transactional relationship is leading to low customer retention.

- Focus:

With the given barrier, I see the challenge is around what means customer centricity for the relationship stakeholders'.

The relationship between Philips and hospitals is understood as a relationship between people and not between organisations.

- Next Step, the challenge now is:

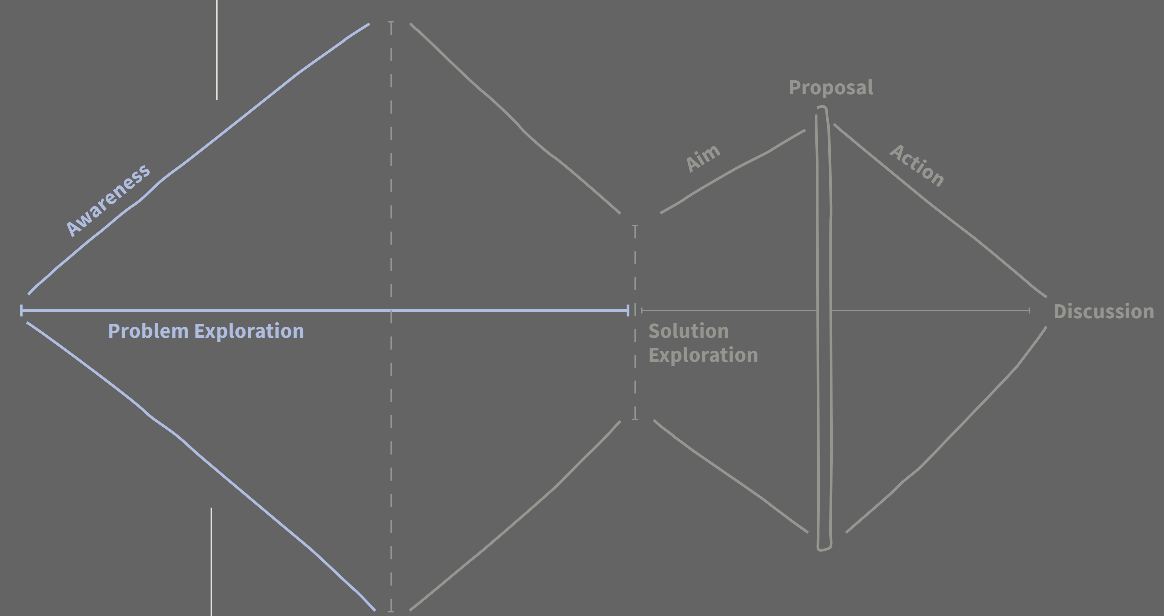
Therefore, I decide to look inside Philips organization roles that may be involved in the relationship, and empathise with them to know (main research question):

Who is taking care of the relationship at the moment?

In what way?

AWARENESS

Chapter 3
Discovering with stakeholders



Who is taking care of the customer relationship at the moment?
In what way?

Chapter 3

Discovering with stakeholders

Research question: Who is taking care of the relationship at the moment? In what way?

In the previous chapter, I warmed up with desk research and concluded there were several issues going along the relationship stages between Philips and a customer hospital.

This chapter presents how I cut through the several given issues by engaging with stakeholders (Philips employees) of multiple levels within Philips for the following goals:
- Understand key barriers of the context.
- Map key moments and stakeholders of the current relationship. (what - who - when)
- Define a project direction for the next second half of the

Therefore, the content follows as:
3.1 - Stakeholder Discovery - Problem Exploration.
3.2 - Stakeholder Discovery - Mapping Assumptions.
3.3 - An Explorative Analysis.
3.4 - Stakeholders Discovery - Who, What, When Mapping.
3.4.1 - Take aways
3.5 - 5 Top Context Insights.
3.5.1 - Take aways.
3.6 - Project direction

3.1 Stakeholders Discovery - Problem Exploration

Problem as given:
The current transactional approach is leading to low customer retention.

Challenge:
How can we build a more customer-centric relationship?

Focus:
Explore Philips internal organization barriers and employees role in the relationship.

Main research question:
Who is taking care of the relationship at the moment? In what way?

Goals:
1 - Map key moments and stakeholders of the current relationship. (what - who - when)
2 - Understand key barriers of the context.
3 - Define a project direction for the next second half of the diamond.

Why this focus?
As shown in section 2.3, the current End to End Customer Experience Journey appears to take around 10 years including multiple touchpoints and stakeholders along.
The project needs to scope down and therefore find specific context and stakeholder within the whole journey.
In my view, it is considered important to tackle the problem as perceived by looking inside the Philips organisation. A new approach acquired by Philips employees could help change the customer relationship to be less sales centred.
For this reason, I decide to engage with multiple stakeholders to understand their role in the current customer experience.
About the reaserch question:
Asking my most immediate contacts “who is taking care of the relationship at the moment” appeared to be uncertain. But not only this, it is also unclear what does “taking care” of the relationship mean.
Is it about selling a product to the customer? Delivering on time? Taking training?
This is also why the problem exploration is broad, because there needs to be a holistic overview before deciding on what to focus.

Methodology:
To give an answer to the research question I ran a cycle of interviews with Philips employees.
A generative design approach was chosen for this explorative research (Sanders & Stappers, 2021). However, since the interviews had to be conducted digitally, some variations were taken to obtain depth and anecdotes from the employees.
To be able to do so, I created a hypothetical blueprint journey. This blueprint was created in the digital platform, Miro. It was used before, during and after the sessions in the following way:

<ins>Blueprint usefulness before the interview sessions:</ins>
- Extract the interview key questions and topics to cover.
<ins>Blueprint usefulness during the interview sessions:</ins>
- Drive the interviewees through a coherent interview thread.
- Visually trigger the interviewees with words and visuals to help them in their answers.
<ins>Blueprint usefulness after the interview sessions:</ins>
- Have organised information and start seeing different patterns between the interviewed stakeholsers.
- See key areas to focus for the next interviews and sychronise this with session time management.

The interviews would take 1 hour and a small questionaire was sent to the participants before having the session as warm up. The information they provided was used to customise the blueprint.
After this cycle of interviews some participants were asked further questions to clarify some aspects.
Sub-questions to the participants:
<ins>Pre-Interview Questionaire:</ins>
· Account or Partnership (they are involved) name.
· Involved since.
· In short, the product & services commitment agreement of the partnership.
· Your role within the partnership at the moment and before.
· Who else is involved, your or partnership stakeholders.
· What value do you deliver.
examples that might trigger you: alignment, a role, focus, win-win, motivation, a platform, change in incentives, other conversations between stakeholders, more or less collaboration,
<ins>Interview Questions:</ins>
· Your role at Philips.
· Your responsibilities within the account or partnership.
· What are key moments for you.
· Who else is involved? What are they doing?
· Do you miss someone?
· What are the different activites you do for the partnership?
· When and how often do you interact with the customer? For what?
· Which channels do you use to communicate?
· What shift needs to happen for the relationship to be more customer-centric?
· Which soft skills and mindset do you apply in the moments we are talking about?

Recruiting the participants - Philips employees.
By exploring “who is taking care of the relationship” I aimed to find out which stakeholders are involved in the use and maintenance phase (the 5-7 years span).
By definition, in some organisation, the persons taking care of the customer relationship are the Account Managers.
These are the main stakeholders recruited for the interviews sessions. However, since the mentioned E2E CX journey is including multiple activities, which could mean different project opportunities, I decided to engage not only with Account Managers but also other stakeholders such as market leads or business leaders.

3.2 Stakeholder Discovery - Mapping Assumptions.

This stakeholder overview shows the participants of the interviews. The blue dots show the assumed participation of each role within the E2E CX Journey, together with the main assumption about the participant/s.
Although more people were contacted, these were the ones who accepted the invite. In this way, the type of roles interviewed could not be 100% chosen by me but there is a good balance taking into account that there are few markets leads in Philips or that there are around 8k salespeople at the company.

MSD01 (UK)
Market Lead, Manage Services & Delivery.

Market lead has an elicopter view of all the customers and keeps a strategic relationship with them to create new opportunities.

BDM02 (UK)
Business Development Manager.

BDM is present many stages where if the client wants to build a long term partnership.

AM01 (DACH)
Regular Account Manager.
With a lot of experience and working for hospitals with high trust in Philips.

AM02 (UK)
Strategic Account Manager.
Since 2 years at Philips but very experienced. Manages two LSPs and other regular businesses.

Account Managers are taking care of the customer relationship from start to end, taking different roles depending on the requiered stage.

AM03 (DACH)
Regular Account Manager and Sales Lead.
Since +5 years at Philips.

AM04 (DACH)
Regular Account Manager.
Since 2 years at Philips, with a lot of experience.

Key Assumptions:
1 - There are roles taking care of the relationship after contracts are signed but it is not clear in what way.
2 - The dynamics and roles can change between markets and between districts.
3 - The current roles along the E2E CX Journey cover customers' needs from start to end.
4 - The assumed job descriptions match the day to day roles/activities.

DM02 (UK)
District Manager.

DM01 (DACH)
District Manager.

District Managers manage new opportunities with the customers of their district.

CDM01 (DACH)
Customer Delivery Manager.

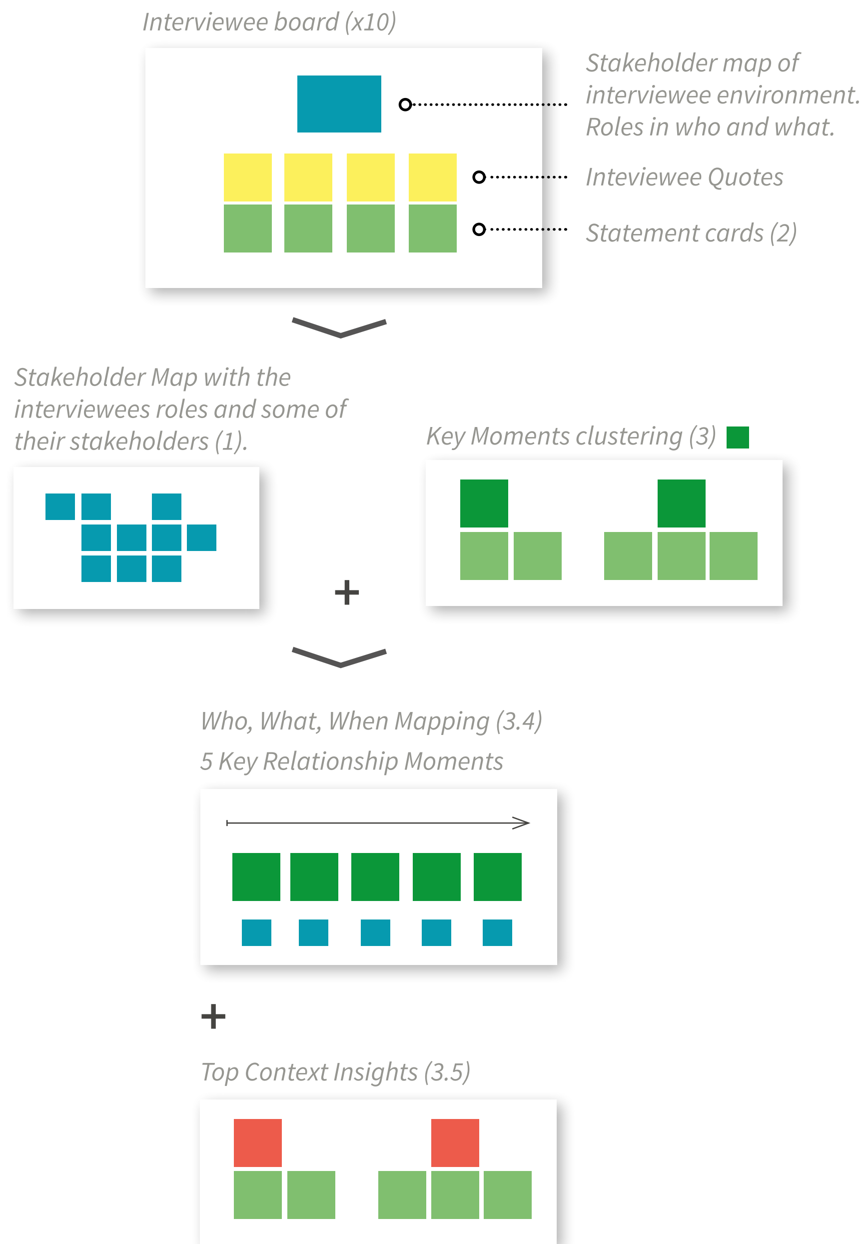
ICDM01 (DACH)
International Customer Delivery Manager.

CDMs take care of the relationship after the contract is signed.

3.3 An Explorative Analysis

In order to meet the goals (section 3.1) of this phase, the following steps were undertaken to analyse the input from the interviewees:

1 - I created stakeholder maps of each interviewee, and blended it all together into 1. This allowed me to understand "who does what".
2 - Transcribed their most important quotes and created Statement Cards.
3 - I started a process of clustering the Statement Cards. My main goal was to come with perspective 3.1, cluster key moments of the relationship:
3.1 - Key Moments Journey: Where clusters were mapped along it and the stakeholders where placed to understand their involvement.
In this journey map I also plotted the stakeholders I had in the stakeholder map. *(This can be seen in section 3.4)*
3- However, along with the interviews I was finding meta insights that were repeating amongst all the interviewees. So I created:
3.2 - Key context barriers: came up with key context insights. *(This can be seen in section 3.5)*



Me in Miro

3.4 Stakeholders Discovery - Who, What, When Mapping.

assumed involvement
actual involvement
take away (3.4.1) 0
rejected involvement

After showing the stakeholders assumptions (section 3.2) and explaining the analysis (3.3), I present a schematic overview (see full version in appendix) of the interviews outcome: stakeholders involvement and key relationship moments. Follow to the next page to know the take aways.

The E2E CX Journey is used to locate the stakeholders, over laying 3 higher level stages (in green) since all the participants were using this reference.

Links between key moments and the roles are done to better explain the take aways in 3.4.1.

5 Key Relationship Moments

The whole journey with all the insights can be seen in the appendix.

CONVERSATIONS AM AND CUSTOMERS AIM TO ENSURE EARLY SALES, NOT LONG TERM COLLABORATIONS

Current conversation moments understanding customers' needs on equipment and pains is used by account managers to ensure early sales, but not long term collaborations.

STAKEHOLDER MANAGEMENT TO BREAK THE SILOS

Stakeholder management and network is a key aspect for philips employees. However, sales people struggles in reaching beyond they comfort network zone.

BEFORE AND AFTER IN THE RELATIONSHIP DYNAMICS AFTER CONTRACT SIGNING

Sales centricity makes the moment of signing to be a before and after in the relationship. New roles and approaches come after such milestones.

UNCLEAR ACCOUNT MANAGEMENT ROLE IN THE "AFTER-SALES" RELATIONSHIP

Although account managers are the responsible of the account during the whole partnership, their after-sale role is unclear and the "level of care" of the relationship will be uncertain in every case.

THE "AFTER-SALES" RELATIONSHIP IS VERY MUCH ON DELIVERYING. THE ROLES INVOLVED IN THIS MISS AMS

Customer Delivery Managers are told to "hold the program" (delivery) and they are confussed by taking care of the account or relationship.

3.4.1 Stakeholders Discovery - 2 Key Take Aways

Key Take Aways:

see number reference in 2.3 section

1 - There is a roles mismatch between the expected "by definition" role and the actual involvement.
=> Account Managers are told to be the responsibles for taking care of all the relationship but if they are present is to sell, not to build an after-sale relationship. So I found they are "sales men".

=> Customer Delivery Managers appear to be the only ones in charge of the after signing relationship. However, their role is clear and very compacted already. They deliver the promised contract.

2 - The after-sale relationship is about delivering and to sell more. There are more roles involved before signing the agreement than after.
=> CDMs are present to deliver the promises. This is a way to take care of the relationship but it doesn't support the whole account needs. At the same time, this role is only present when the agreement is a "Long term Strategic Partnership", meaning that, if the customer does not build this type of agreement (80% of cases), this role will not be there and there will be already less care.
=> Account Managers have regular and direct contact with the customer but they will be occupied in meeting their targets and short term deals.

—–

These take-aways lead to the project direction (first half of the first diamond) that I describe in section .

3.5 Stakeholders Discovery - 4 Key Context Insights

During the interviews with the mentioned stakeholders (section 3.2), I started seeing repeated insights amongst all the interviewees.
This was surprising for me since all the stakeholders belong to different levels in the organisations. Moreover, they also get involved in the different moment along the journey as I show in section 3.4.
These patterns could not be ignored and I decided to collect them. However, they were meta-level insights or in other words, context barriers of the Philips organisation. Since the project is exploring the problem at this moment and it still needs to scope down, I decide to present the 4 key context barriers in the next pages, and along the report, the reader will be indicated when such meta-level barriers affect other findings or smaller contexts.
After explaining the 4 insights in the following pages I present the takeaways and what I see they mean within Philips (3.5.1).

1_
PARTNERSHIP YES, BUT WHAT PARTNERSHIP?

2_
ROLES AND DAY TO DAY MISMATCH.

3_
CAN'T GET TO THE OTHER SIDE.

4_
CUSTOMER CENTRICITY DOESN'T CENTRE

1st Top Context Insight

PARTNERSHIP YES, BUT WHAT PARTNERSHIP?

Philips first priority is driving "customer first" strategy across the entire organisation.
On the one hand, this implies looking at how do we currently relate with our customers.
On the other hand, it implies building desired practices, perspectives and terminology to craft the expected context.
Therefore, Philips needs a very crystal clear north star to guide the 80k people in the company.
Within this transformation, Philips finds that the partnerships signed are not providing enough money as the typical purchases do. So in this sense, the company is in a learning process.
Moreover, at the problem exploration phase, I found confusion and contradictions between Philips employees when referring to certain topics such as "partnership" or "customer needs".

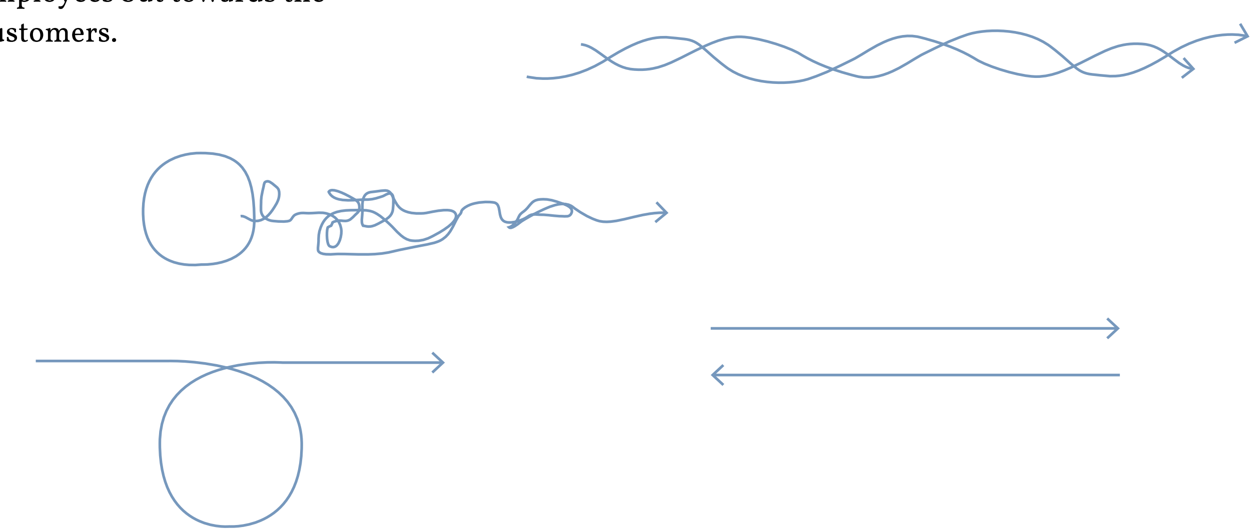
Let's take the example of "partnering up".
Being willing to "partner up" is fair however, in some occasions within Philips, the ultimate goal of it is found to be purely commercial.
The existing issue in the multiple versions with saying "building a partnership" is that it limits the desired transformation towards customer-centricity that Philips is pursuing. According to the interviews I had (explained in this chapter, 3), employees give different definitions of "partnering up" and some of these definitions are yet unclear.
The question I have is: what does it mean to partner up for Philips putting the customer first?
I found this topic a terminology issue when addressing the project to the multiple stakeholders I engage with.
I always missed an extra word after "partnership" to emphasize what is meant. The word "partnership" alone is not enough. However, as said early in this page, behind this issue lays the fact that Philips is in a transformation and learning process to build partnerships.

"A partnership for me is something that... let's take a step back, I think word partnership has been so missed used... because people use it as a quick answer "oh we work in partnership" just to get a quick sale... or customers also misuse it cause they use it as "give me some money" or "a cheap deal" but, for me it's re-education of the people involved to really understand what we as Philips see as a real partnership".
-MSD01

Above I show a market lead expressing the frustration on the topic I am arising and his/her awareness on the terminology used not only between Philips employees but towards the customers.

In other occasions, it has been observed that "keeping a sales relationship" is synonym of "partnership" according to Account managers.

a - We want to make money.
b - Yeah.
c - No! We want to help them succeed and we will make money out of it.
- Project stakeholders.



Abstract partnership shapes

2nd Top Context Insight

ROLES AND DAY TO DAY MISMATCH.

This is insight is also part of the take aways presented in section 3.4.1 and it is mainly affecting Account Managers but also Customer Delivery Managers in the after-sale phase *(as mentioned in 3.4.1 the roles and touch-points are fewer by then)*.
Since the roles mismatch is more prominent in Account Managers, I am going to talk about them. There are around 8.000 people selling at Philips, and they are divided into 3 hierarchycal groups mainly. Strategic Account Managers are around 150 persons. Second, Key Account Managers role is around 3.000, and the rest are Regular Account Managers.
Now, I knew this by the end of the project when I already had my network of Account Managers and had interviewed them.
I was calling them all "account managers" without knowing that some could be "strategic", "key" or "regular".
Therefore, I asked them and I found out that 2 of them were "strategic" and the others were regular (with some differences). The assumption was that there would be strong differences between a Strategic Account Manager and a Regular Account Manager in terms of how they interact with the customer.
On paper: Regular Account Managers focus on a single business (eg: radiology, imaging systems) and they sell modalities (single products). "Strategic Account Managers" instead, focus on selling solutions (which include multiple businesses, products and services).
However, looking back at the information I got from my interviewees, I did not notice the assumed differences while they were asked the same questions.
My conclusion is that they are all salespeople and this is why in this report I refer to them all as Account Managers.

3rd Top Context Insight

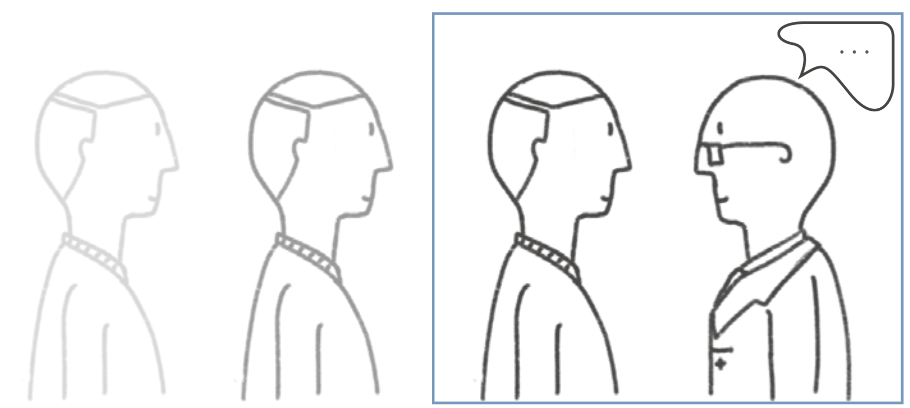
CAN'T GET TO THE OTHER SIDE.

In the third key context barrier, I am going to talk about privacy, sharing and communication affecting multiple areas of the customer relationship context.

The first point I want to address comes from my personal experience as a designer within the company.
Since we are talking about customer relationships, the project was assuming to get both sides points of view (customer and Philips). However, it was not possible to connect with the customer side, the healthcare professionals for the following two reasons.
On the one hand, it requires some procedures to be able to have encounters with customers for privacy reasons. Assuming that designers within Philips need to talk to customers to keep their design process up, these procedures impact the design process and outcomes.

On the other hand, account managers are territorial and private. Therefore I was told that it was better to first build a relationship with them and then, maybe, they would give me access to talk with their customers. In fact, within Philips, I heard other stakeholders defining Account Managers as territorials. I also saw that during the interviews I had with them since they try to protect the deal they are pursuing with the customer.

Another point of view in this key insight but related to what I just said about not being able to talk with customers, is that we (as Philips employees) only know about customers through NPS results. I find it delicate to use NPS results in my design process since I feel Philips takes that as a reference, generalising the answers while probably a lot of customers are doing great. Others may not fill in this form and others have other stories to tell or even prefer other channels to talk to Philips.



4th Top Context Insight

CUSTOMER CENTRICITY DOESN'T CENTRE

This top context insight comes from the realisation that "customer-centricity" feels a bit vague in Philips.
This is an insight that I could verify along the project.
At the start of it, and as it is explained in section 2.2, Philips first priority is "to put customer first". The whole company is in the urgency of becoming more customer-centric. In other words, the culture, the employees behaviour and work should be customer centric.
At the moment there are two main sourced that provide understanding of what means customer-centricity within Philips. One is the Our Behaviours, a document that gives some directions on customer centricity. The other one is the Customer Experience Manifesto, which is an articulation of the first one but it is used to advocate across the company since the last year."

Our Behaviours" define the light blue statements that try to call the attention of Philips employees and encourage them to follow the defined behaviours.

At Philips, we believe the customer always comes first. Priority number one, above all else, is our customers' success, their satisfaction and trust in the Philips brand.

- Customer Experience Manifesto


Our behaviors
are our culture

- Customers first
- Quality and integrity always
- Team up to win
- Take ownership to deliver fast
- Eager to improve and inspire

What are you doing to live our behaviors every day?

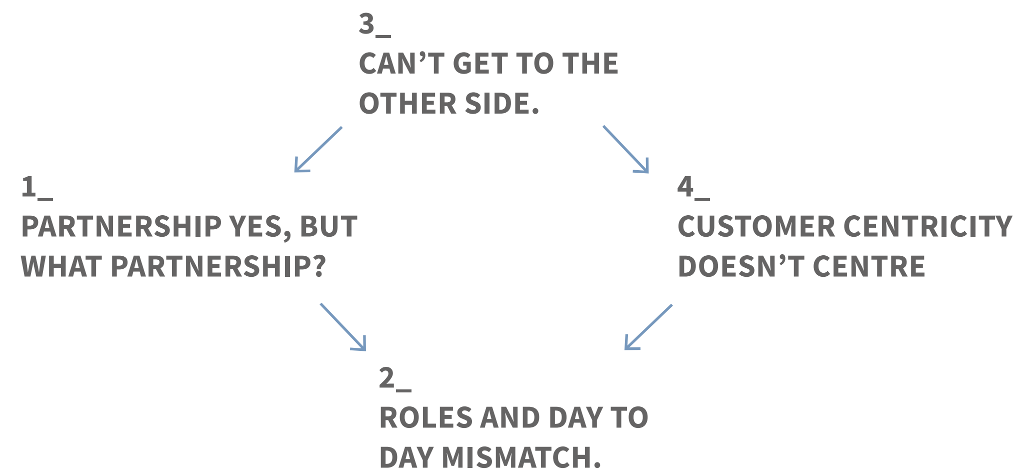
I always seek to understand our customer needs. I prioritize to engage effectively with our customers and deliver innovative solutions that meet their needs.

I make it easy for our customers todo business with us. I team up with colleagues to deliver on our promises and act as a partner to out customers.

I want our customers to have the best experience with Philips, outperforming competitors.

During the project I missed clarity in knowing what is customer-centricity for Philips or for smaller contexts within it. I think that more focussed and shapr customer centric definitions for specific groups of employees would help to deliver the ultimate aim of customer centricity. Because leaving it broad for the whole company stays as mindset, and perhaps not all the employees would apply the definitions in the same way.
In a lot of occasions, at Philips we end all the conclusions saying: "this should be more customer-centric". But this is not saying anything. The truth is that there is a sharper version of customer centricity behind. Moreover, this sharper version would change in all the different occasions.
At the same time, the different stakeholders have their own role within Philips and customer centricity. Maybe their mindset is right, but how can they then put customer centricity (or the sharper level) into practise?

3.4.1 - 4 Key Context barriers - Takeaways



These are the 4 key context insights I found by interviewing the stakeholders I introduced in section 3.2.
I see these insights as barriers for the navigation of the project and also the ambitions of Philips.
On a macro level, where Philips is huge, and I certainly know there are more barriers, but the project will scope to a micro level so that these barriers are more manageable.The current situation of Philips beign a vendor and behaving transactional brought the 3rd insight in a first instance. This isnight reflects the way Philips employees can relate to the customers.
Philips has an ambition (chapter 2) however, customer centricity might not always centre all the company employees. This can be seen by the fact that it is also unclear what means partnering up and therefore what relationship is Philips establishing with its customers.
Finally, although Philips want its employees to put customer centricity into practise, it appears to be a mismatch between the desired roles and the actual ones.

3.6 Project Direction

Project Direction:
The project will focus on exploring in more depth how is the current Account Managers - Customers relationship.

- At the moment, I'm done with my LSP.

+ When did it finish?

- We are going to finish it next year.

+ Ah, and why do you say its done?

- Because I'm a sales man. I am involved prior the deal and to close the deal, because I'm a typical sales men.
- AM03 and I.

<u>3 Reasons from 3.4:</u>
- By definition, they are the ones that should hold the accounts, the face of Philips. => They are expected to know "how" is the relationship going.
- They are at the core of the transactional approach. => And Philips wants to move out from it.
- They keep very regular and direct interaction with customers. => They could bring the presence that some customers are missing.

Moreover, it is currently under investigation at Philips to what extend is Account Management affecting the current relationship.
Account Managers assumption:

Account Managers are taking care of the customer relationship from start to end, taking different roles depending on the requiered stage.

False.
AMs keep a selling role always, and this is the transactional approach or the "type of care" Philips wants to move out from. However they are told to be "generalists" cause some customers approach them for any issue.

<u>Reasons from 3.5:</u>
Account managers are a huge group within Philips but they also feel like an "independent" group since they stay in their comfort zone and barely network on multiple levels in the organisation. In this sense, they stay with the sales-centred approach and dialogues being unable to be involved in others.

They see a partnership with the end goal of selling. There is a big mismatch between the assumed and the day to day responsibility. They are territorial with their customers to protect the deals (due to the sales centricity), and they are ok in the transactional dialogues zone but struggle in engaging with stakeholders that require other types of dialogues.

Moving towards account managers means to explore the meaning of customer centicity in a sharper and focussed way. In chapter 2, customer centricity appeared to stay in the macro level. But what means customer centricity for Philips Account Management? This should help this part of the company move towards the desired scenario.

Untaken Directions:

While focussing on Account Managers, I scope down the project leaving other opportunities on the way.

<u>Why?</u>
I am going to explain it by using the left roles assumptions:

Market lead has an elicopter view of all the customers and keeps a strategic but not regular relationship with them to create new opportunities.

True.
Plus, this role will push district and account managers to behave in a more customer centric way pulling trainings for account management.
This direction would lead to the chosen one.

BDM is present in many stages when the client wants to build a long term partnership.

False.
In fact, BDM will be mostly present before signing deals and will pull different product deals together to build larger opportunities and projects.
This is a role expected from the AMs also. AMs only focus on their business but should open their scope and network.

CDMs take care of the relationship after the contract is signed.

False.
They take care of the delivery and this is only a part of the whole relationship.
Despite from their active role during the after-sign phase, their job description fits their day to day role. Also, this role is very tailored and packed. Plus, this is a role only present in the 20% of Philips customers, while AMs are in contact with all of them.

"Well, all the current touch-points are important of course, such delivering the promissed contract, but you see? It's only delivering. Who take care of the relationship after deals are closed?"
- Principal Design Strategist.

District Managers manage new opportunities with the customers of their district.

True.
But also take care of the NPS score and the AMs performance. They are then not left a part completely because AMs report to them and therefore have an overview of the customer-AM interaction.

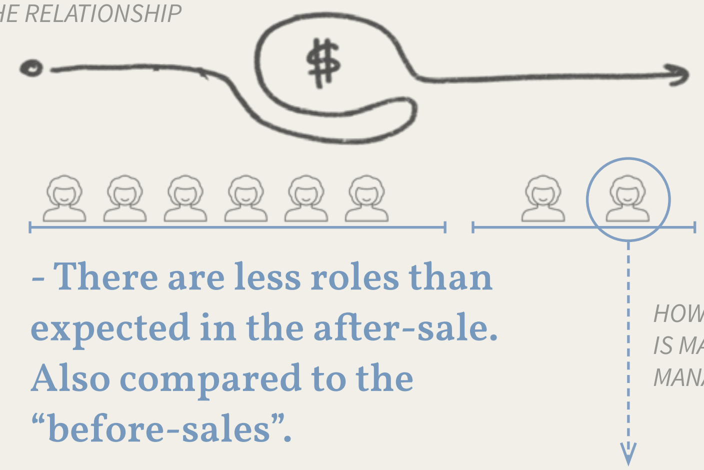
KEY IDEAS IN THIS CHAPTER

Chapter 3
Discovering with stakeholders

TOP KEY CONTEXT INSIGHT TO MOVE OUT OF THE TRANSACTIONAL APPROACH:

- Macro level customer-centricity is to vague and not practical for employees to follow Philips ambition on “putting customer first”.

ZOOMING INTO THE RELATIONSHIP STAKEHOLDERS



- There are less roles than expected in the after-sale. Also compared to the “before-sales”.

HOW THE ROLES MISMATCH IS MANIFESTATED IN ACCOUNT MANAGERS.

- AM are the ones who are supposed to take care of the customer relationship but I discovered they are “sales men”. Their approach for taking care of the relationship is transactional, despite Philips encourages customer centricity.

There should be a micro-level understanding to let AM be more customer centric.

Project Direction:

Get a deeper understanding of the role of Account Managers (AM) within Philips and towards the customers.

- By definition, they are the ones that should hold the accounts, the face of Philips.

=> *They are expected to know “how” is the relationship going.*

- They are at the core of the transactional approach.

=> *And Philips wants to move out from it.*

- They keep very regular and direct interaction with customers.

=> *They could bring the presence that some customers are missing.*

Discussion gates

Introduction

In this thesis, the "External literature review"( ) is collected in the form of what I decided to call "discussion gate". The main thread of the whole project story is created through "Philips internal literature research" ( ) and "Research through design activities" ( ). However, this thread is complemented with 3 main external literature reviews that help to understand the 3 key project topics from an external point of view (external to Philips and to my own design activities).

3 discussion gates
for 3 project core topics:

Discussion gate 1,
Customer Centric Relationships

Key questions and answers:

- Where are companies moving towards when moving out from transactional relationships?
- Towards cooperation.
- Towards meaningful partnership (no matter short or long)

- What does it mean "to partner up" or "to be in partnership"?
- To create an exchange of value.
- To see both partners as partners (not 1 customer and 1 provider).
- Mutual success.
- To reflect

- Why personal relationship traits can help to improve Philips customer relationships?
- Relationships are made form people.
- From macro to micro level of relationship.
- Personal relationships put presence and over time experiences at the heart of the relationship.

Discussion gate 2,
Employee Experience

Key questions and answers:

- Why improving Employee Experience for customer relationships?
- It is the micro level of organizational design.
- External factors influence employees behaviour.
- Limitting beliefs stop changes from happening.

- The role of design and Employee Experience.
- Design as means to eliminate uncertainty.

Discussion gate 3,
Reframing Dialogues

Key questions and answers:

- Framing and reframing,
Framing as process.
- From transactional dialogues to eventful & present dialogues.

- How to encourage Account Managers to co-create with their customers?
Dialogues as Focus
- Simple tools
- Transformative learning

Discussion gate 1

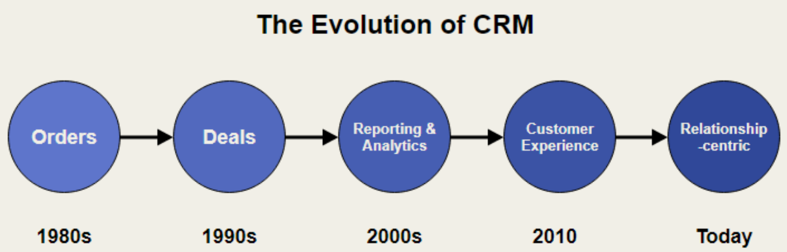
CUSTOMER RELATIONSHIPS

Key questions and answers:

- Where are companies moving towards when moving out from transactional relationships?
- Towards cooperation.
- Towards meaningful partnership (no matter short or long)

- What does it mean "to partner up" or "to be in partnership"?
- To create an exchange of value.
- To see both partners as partners (not 1 customer and 1 provider).
- Mutual success.
- To reflect

To get the discussion started, I first give a description on what is customer relationship (better known as customer relationship management, CRM) according to Philip Kotler and Gary Armstrong: *"CRM is concerned with managing detailed information about individual customers and all customer "touch points" to maximize customer loyalty. It can also be defined as, 'an alignment of strategy, processes and technology to manage customers, and all customer-facing departments and partners".*
With the economic recovery after World War II, businesses and organisations customer approach was mainly transactional, where an entity sells and another buys. For this discussion bite we will understand "customer" as another business. Kotler popularized the E. Jerome McCarthy marketing mix approach around 1960. From those years until the present moment, marketing has played a core role in developing and managing Customer Relationships for any company.
Below you can se an overview of the evolution of customer relationship managemnt (CRM) by Philip Kotler:



He describes that the focus of the relationships in late century XX was maily putted on the product sold. This transactional approach can still be recognised in many companies at the moment. As explained in the project chapter, Philips is also experiementing the moving aways from selling products to their clients hospitals.
Digging into the topic, I had the following question: Why do companies exists? Looking at the evolution of CRM I can immediately link each focus to the reason of existence. In the case of Philips, their first priority is to put customer first.
Despite all companies make money, Philips too, what is the core reason for them to exist? I found the opinion on different economists and educators:
"Great companies are not in business to make money, they make money to stay in business and accomplish an important purpose". - Mary Poopendieck (2015)

"Profits and increased shareholder value are not and should not be viewed as the purpose of the company's existence. They are the happy by-product of defining and fulfilling purpose to delight customers with high-quality products and services that have a market, keep the company in business, and provide jobs". - Mikel Harry (2015)

"Most American executives think they are in the business to make money, rather than products and service." -Yoshi Tsumuri (1965)

"Congratulations, you've just cracked the deal and now you've got a list of new clients. Now, what do you do? Build worthy client relationships! Strong client relationships are much like any relationship, you can't grow if you aren't putting any effort. Just like any relationship, your relationship with the client is built with actions you take over time". - ProofHub (2020)

Moving away from a transactional approach towards a relational one actually means a move: from lineal and ending relationship to a continues and over time interaction. From offering to the customer to decide with the customer.
Within the context I am exploring (the relationship between Philips and hospitals) the customer is the hospital, and both have a relationahip, interaction, partnerhsip or interorganisational relationships *(Hardy, Phillips, & Lawrence, 2003: 323).*

Discussion gate 1

CUSTOMER RELATIONSHIPS

Partnerships with customer centricity:
Understanding that we move towards an inter-organisational relational approach, we also see a switch in contracts. We move from having contracts describing a deal with a start and an end (if any), to long term agreements where the assumed relational approach can evolve over time.
It is know that partnerships have existed since middle ages *(Padgett, John F.; McLean, Paul D. 2006)*. However, partnerships started to have a new role within the CRM evolution described before, and we find that more inter-organisational relationships partner up.

I invite you again to look at muliple definitions of partnership:
"A partnership is an association of two or more persons to carry on as Co-owners of a business for profit. The essential characteristics of this business form, then, are the collaboration of two or more owners, the conduct of business for profit (a nonprofit cannot be designated as a partnership), and the sharing of profits, losses, and assets by the joint owners". -Uniform Partnership Act
"A partnership is the relationship between two or more people to do trade or business. Each person contributes money, property, labor or skill, and shares in the profits and losses of the business".- Internal Revenue Service (USA)

Let's dig deeper into partnership. Benjamin Gomes-Casseres, 2011, explains The experience of Scott McNealy, ex-CEO of Sun Microsystems, who tweeted:
"Most over used phrase in business is 'strategic partner.' Favorite partnership for me is a purchase order. Defined charter, beginning, end." - Scott McNealy, ex-CEO of Sun Microsystems.
Bejamin adds: *"That is precisely why many external partnerships fail. True collaboration is much more than a purchase order. Setting up an external partnership as if it were a purchase order, at best, leaves value on the table. At worst, it leads to conflict and value destruction. A true partnership creates ways to manage these uncertainties, and does not default to executing against a predefined contract, as one would with a classic purchase order"*
Organizations, may partner to increase the possibilities of achieving their mission and to leverage their reach.
My observation is that there are the following key characteristics: minimum number of members, shared values, exchanges of values, time (open end) and purpose.

• Most major pharmaceutical companies are well-known for their joint R&D deals with biotech start-ups. These collaborations take many forms, from sharing personnel to minority investments and licensing of intellectual property. Most of the partnerships involve highly uncertain outcomes and research trajectories, but these uncertainties are structured and managed to share risk and new investments.

Sun's own experience is a case in point. Under McNealy, Sun ran its "partnerships" in the spirit of purchase orders. In its heyday, when Sun sold servers running its proprietary architecture and software, the company bought semiconductors from major vendors, such as Fujitsu in Japan. But for many years it took a hands-off approach to new product development — dictating needs, but letting vendors bid for a slot on the Sun server and sink or swim after that. One of the results of this approach was that vendors failed to invest sufficiently to produce advanced products for Sun. Recognizing this, Sun began to work more closely with Fujitsu and Texas Instruments.

This kind of approach is common for firms that are in dominant positions in their industries. They tend to play vendors off against each other and shy away from partnerships that require some sharing of power. But firms seeking to expand into new fields or facing an onslaught of new competition often turn to alliances. Their challenge then is to learn how to manage these partnerships differently than the vendor relationships they had before.

Discussion gate 1

CUSTOMER RELATIONSHIPS

Towards Cooperation:
Moving out of the transactional approach makes this project want to answer: where are we moving towards instead?
The evolution shown in the previous page is not merly happening by coincidence but because the whole world is moving from competition towards cooperation (Stowe Boyd, 2021).

"We can't find balance while the world is so out of balance. And any balance must come from putting the world and its living creatures before mankind, and then others before ourselves. Yes, those others include community and family, but can't be limited to only those that are closest to us. We must put all others before ourselves.
We are obliged to accept the curtailing of our personal freedoms (the right to pollute, to waste, to look away) for the sake of helping to balance our collective relationship to each other and the world".
- Make Meaningful Work

The path to move towards cooperation shows that the focus is very much on the people.

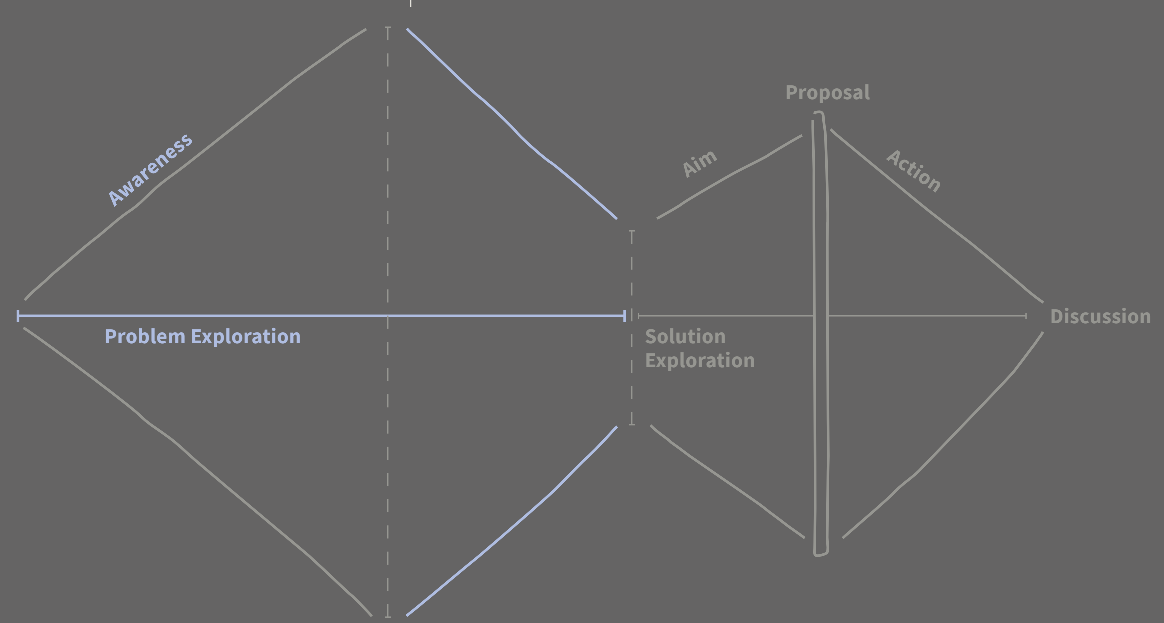
By the people:
Some authors claim that partnerships and collaborations are not between companies but between people. In this sense wee can find human to human marketing (H2H) (Kotler, Sponholz, Pförtsch, 2021).
But also (van Burg, Berends, van Raaij 2013) claim the importance of putting people in the centre of the collaboration.

As I showed during chapters 2 and 3, Philips ambition is to move out of the transactional approach and move towards customer centricity. However, Philiips is a huge company and during my design activities I experienced a misuse of the "customer centricity". It almost looked like a wild card. Each employee or department within Philips probably has a different role towards customer centricity. Therefore, athe person (employee) micro level, customer centricity can not keep staying macro and mindset only.

Since the project is about customer relationships and (van Burg, Berends, van Raaij 2013) advocate person to person relationships, the aim will be to define customer centricity at the micro level (defined in chapter 5).

AWARENESS

Chapter 4
Empathising with Account Managers



What are the current pains of the interaction between an Account Manager and a customer?

Chapter 4

Empathising with Account Managers

After learning from various Philips employees and choosing to focus on Account Managers, it is time to get a deeper understanding on their role within the relationship between them and the customers.
To drive you through the findings, I am going to introduce Account Manager Joe and customer Dr. Sam.

The thought process and challenges tackled in this chapter are represented in the sections as they follow:

4.1 - Introduction. From Macro to micro level.
4.2 - What are Account Managers working for?
4.3 - Account Managers within the E2E CX Journey.
4.4 - The triggers for a transactional dialogue.
4.5 - What are Account Managers learning?

"As an account manager I'm always responsible to influence the decision of the customer. It's also the main point where I'm measured on, because every year I have to sell stuff from 5 to 10 M euros". - AM03

4.1 Introduction. From Macro to micro level.

Approach:
The information used to conclude this chapter was taken from the research explained in chapter 3, but also during "solution exploration". A great point during the problem exploration was that I managed to build my own trusted Account Managers network. This small network allowed me to have smaller interviews with Account Managers until the end of the project to understand small aspects according to the stage of the solution exploration. These stages are represented in sections within this report, but also, the gathered insights might be used in multiple sections (not chronological).

Locating Account Managers and sales roles within Philips:
Account managers have direct and regular contact with the customer to get as many purchases as they can.
From top (market lead) to bottom (AMs) "sales" is the common point between the roles. However, top-down have strategic conversations with the executive hospital level (key leaders), and AMs have product-value conversations with the doctors of the hospital.
At the same time, Account Managers are organised into silos meaning that 1 account manager will belong to one "business" such: radiology or ultrasound, or image guided therapy, etc.

Therefore an Account Manager customer will only be able to buy from one business.

In the next pages I am diving deeper into this micro interaction Customer-Account manager gaps and the role of AMs.

MARKET LEAD
All market level

SALES LEADER
District level

DISTRICT MANAGER
Manage Account Managers

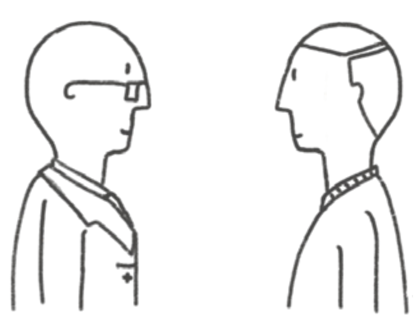
reports to

ACCOUNT MANAGER
Hospitals account holders and sales of 1 business.

CUSTOMER
C-suit

MICRO - LEVEL of Interaction

CUSTOMER
Hospital doctor or head of department.



4.2 What are Account Managers working for?

Employees success factors might limit the transformation Philips strives to go through.
In Philips there are two main factors to be considered: Perform and Transform.
If we are talking about customer relationship, what factor do we value from the employees when doing their hoped customer-centric work? In other words, are employees success factors customer-centric?
I did not look at the key success factors of all roles directly involved in the customer relationship, but here I present the ones for a "Strategic Account Manager"

KEY PERFORMANCE INDICATORS

- Revenue / OIT (Growth) / CSG
- Sales funnel health (%)
- LPS / Solution funnel (where applicable)
- NPS+
- Total customer value
- Year over year growth
- Reoccurring revenues
- Forecast accuracy of Sales
- Quality: DEFOA / FCR, # CAPA Open
- Account P&L, revenue and margin

As we can observe in the figure below, most of the indicators are based on the deals achieved throughout the year. However, it can not be concluded that Account Managers day to day work is determined by these factors because such figure is taken from a job description for a job offer.
I asked Account and District Managers to let me know their KPIs but for some reason, I never receive an answer to this question (in interviews they would address the KPIs of the figure, but it stays general, via

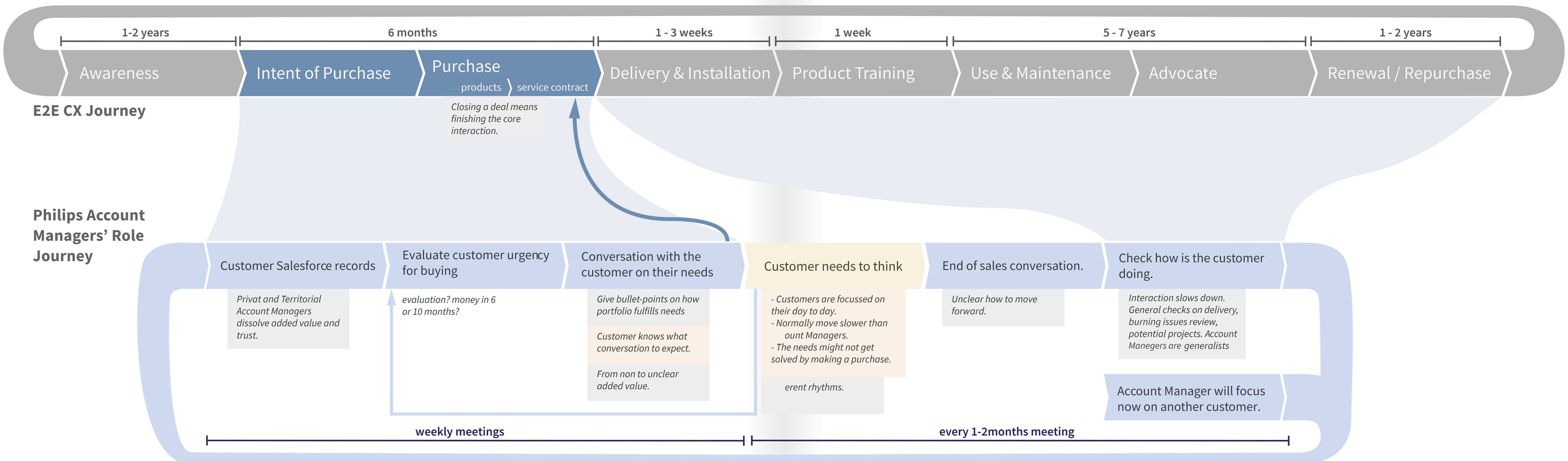
"Being honest with you, I'm looking at another Hospital, looking at an LSP, so I will get a % of that contract once its is signed, a big bonnus. But then, what I get from this other Hospital is bites and pieces because it's a normal hospital for me. - AM02

As clearly seen in the quote below, the relationship between an Account Manager and a customer might be based on the sale of a product.

"I decide what kind of product out of the portfolio can fit the customer, and I give to the customer bullet points on why this is product fits him, and fortunately we have every type of products to sell. If they don't fit to the customer, I go to the next one, because I don't want to sell something that doesn't fit". - AM03

However, Account Managers are the responsibles for selling solutions and build business cases around the Quadruple Aim (section 2.2). This, to follow the transformation Philips is going through.

4.3 Account Managers within the E2E CX Journey



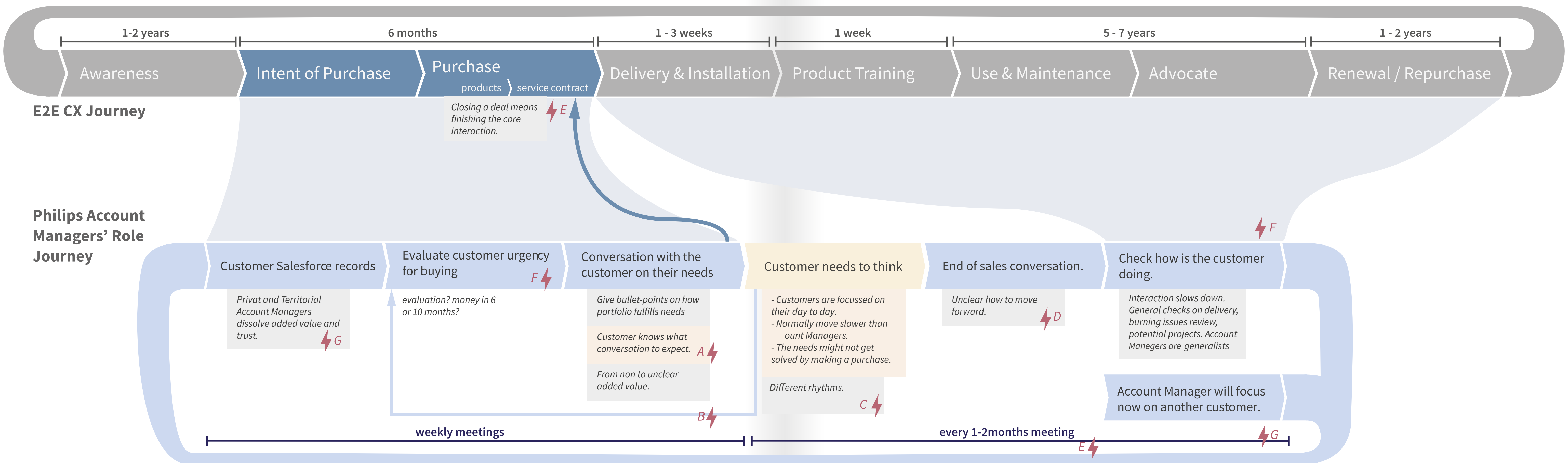
In the figure above, it can be seen where is AMs involvement during the E2E CX Journey (grey) and what does this involvement consist in in the Ohilips Account Managers' Role Journey (light blue).
Plus, AMs current journey is a constant loop. See the Key existing Pains in the relationship betweeen AM and doctor, triggered by the education and outcomes factors mentioned in section 4.4.

Approach:
This is a simplified overview of a more extensive Blueprint (Philips Account Managers' Role Journey) that I did during my research where more information was included. However, here are shown the most important aspects that affect the customer relationship and the aspects that better describe the job of an account manager at Philips.

Key observations of the presented journey:
- AMs are mainly present during Intent of Purchase and the Purchase. After these intense months when they fight for the deal, the interaction slows down.
- While the customer is going through the process from delivery until renewal, the account manager will have regular checks trying to build the next purchase.
- The relationship will be more or less intense depending on the chances to sign a deal.
The reason why AMs go through these stages and what are the consequences is explained in the next section.

4.3 Account Managers within the E2E CX Journey

AM - Customer Relationship Pains



A.
Customer knows that the conversation with AM will be transactional.

AM approach is always the same due to their goals. Customers get used to this approach and assume what is possible and what is not within the relationship.

B.
From non to unclear added value in the relationship.

The conversation is limitted to the deal and does not explore other dialogues that could sustain the relationship and interaction.

C.
Different rhythms between AM and Customer.

AM want to move faster than customers. There is no consent or adaptability from the AMs side to see that other dialogues than the sales one, adapt better to the customers' rhythm.

D.
Unclear how to move forward.

There is no plan other than aiming for order signed, to keep the relationship and have a mutual plan.

E.
"Closing a deal" or "no urgency for the customer to buy" means slowing down the interaction.

Since the aim of AMs is to sell, once this is done or the customer is not in the need of buying, the interaction will be less.

F.
AM evaluate and create urgency for the Customers to buy soon.

AM will always try to push customers to sell as soon as possible. This is due to their targets.

G.
Privat and Territorial Account Managers weaken communication and trust.

AMs protect their strategies to get the deals in two ways. One, they have a plan to perssuade the customer without this one being aware of it. Two, they do not reveal their plans or relationship status to the rest of the company (Philips).

4.4 The triggers for a transactional dialogue.

Why the previous showed pains exist within the relationship?

2 external factors influence Joe's role (account manager) giving a transactional interaction with Dr. Sam.

ACCOUNT MANAGER, JOE

1 - HEAR:

On education:

- Commercial trainings tell account manager how to "sell better". (seen in chapter x)
- Had a commercial education background.

On expected outcomes:

- KPIs push AMs to purssue sales centred outcomes.
- Incentivisation for selling more and to new customers, (not to retain customers).

2 - THINK:

On goals:

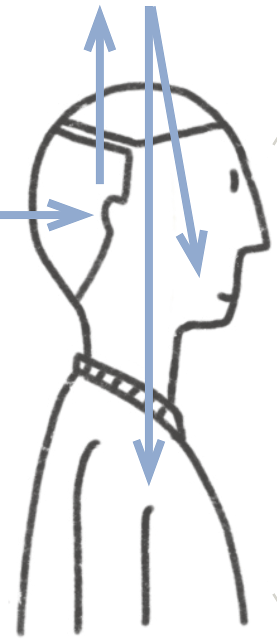
"I want to get this order"

"I am going to convince my customer"

Limitting beliefs:

"Every thing is okey"

"I will not share this"



8 - SEE:

As a customer.

3 - SAY:

"Have you seen this new in our portfolio?"

4 - DO:

On soft skills:

- Reactive
- Persuasive
- Privat

INTERACTION OUTCOME:

- Product value only
- Deal hunting
- Mismatch rhythms
- Customer needs used for selling.

8 - SEE:

As vendor.

7 - SAY:

This part is uncertain since I did not have the chance to be in a meeting with a customer.

6 - THINK:

On goals:

"I want my team to be at the top of their clinical performance and minimise administration burning."

Limiting believes:

"With Joe, I have assumed that the outcome of our meetings will be a purchase".

CUSTOMER, Dr. Sam

5 - HEAR:

- Joe's sales dialogue.
- Other companies act like the partner I need.
- The needs of my hospital stakeholders.

"What you are showing to me is overlaping a lot with the sales excellence trainings. We are already doing this". - DM01

This was said by a District Manager during an experiement were I presented a tool as part of the problem exploration. I presented him a tool that would trigger a different type of dialogue between AMs and customers.

This quote was the trigger for me to look at Account Managers trainings.
The main implications (think, say, do, interaction outcome) that the current trainings have on the AMs' behaviour are shown above, but in section 4.5 I go deeper into this education topic.

To understand the relationship barriers between an AM and a customer, I introduce you to Account Manager Joe and customer Dr. Sam.

Empathy Map conclusion:
The education and the outcomes of Joe's role (account manager) will define a transactional interaction with Dr. Sam.

Approach:
With the insights gathered during the problem and solution exploration, I defined this Empathy Map to understand the current AM - Customer barriers and consequences.
Firstly, only the appropriate aspects of the original method were used since not all the areas (hear, think, say, do) can be completed because of the interaction itself (such, customer-say). Secondly, I linked the areas between each other to show how "hear" influences "think", etc.

From "Hear" to "Outcome":
The outcome of the interaction is mainly defined by (HEAR) the triggers. The 4 bullet points under "hear" show what Account Managers are asked to do and what are they thought. In the education and the expected outcomes lay the main reasons on their behaviour and interaction outcome.
Training and expected outcomes belong to the current transactional culture of Philips but are manifesting on AMs. Therefore, this project is going to focus on the education aspect since changing the expected outcome becomes more complicated.

4.5 What are Account Managers learning?

Focus: Education

Since the educational part is seeing as a key problem to on why AMs behave the way they do, an important questions within the project was to investigate: What are Account Managers learning?

Networking

After the trigger mentioned in section 4.4 from a district manager, I started networking within Philips with those involved in the current training from different levels. On the one hand, it was important to get access to the documents of the training. On the other hand, it was important to engage with leaders such Sales Excellence trainer in Philips University to see how the future proposal could be part of the current training.

Being Account Managers one of the main stakeholders interacting with Philips customers, it is easy to find a number of training and education initiatives to boost their selling approach. This is undertaken by Philips University, but also Sales Excellence and external companies.
However, the materials point to “the new way of selling” or “the successful sale”, and my question here is: **Although Philips wants to move away from transactional approach, why are we still using the word “selling”?**

For instance, the training put the focus on a good relationship in “understanding customer needs”. This claim sounds fair, truthful and key for the announced strategy, however, the ultimate goal is still purely commercial. The issue with saying “understanding customer needs” is that it is understood in a different way amongst the employees.
(This relates to section 3.5 key context insights, 1st)

Key observations on Sales managers trainings:

1 - The training focus on the purchase moments. This is in the intense moments I pointed in section 4.3. So they talk about how to manage the customer during a certain period in order to get the purchase, but training do not address other opportunities, goals or approaches.

2 - The training talk about persuading and creating urgency for the customer to buy.

3 - The trainings are expensive for Philips, especially if Philips wants to educate the around 8.000 Account Managers. Sometimes the company only trains “strategic account managers” but these are around 200.

4 - The content puts the focus on the mindset and is lacking pragmatic tools for the AMs to be used in the actual interaction with the customer.

5 - It appears that the only value that parties take out of the relationship is money and products.

Below we can see some of the titles of the trainings content for Account Managers. Despite being willing to become trusted advisors, selling is at the core of the purpose.

Account Manager missing support:

“I think this is a really important thing, you know... That’s a topic which is not already done yet in our sales process. We always fall back into the old behaviour selling boxes, and the major problem in this is that then we are comparable to our competitors.
It’s a new way of selling, you as AM have very basic knowledge but you need education and experience, to be more an advisor than a sales person. And the company has to give you the opportunity to get this experience”
- AM03

KEY IDEAS FROM PROBLEM EXPLORATION

Chapters 2, 3 & 4

PHILIPS AMBITION

Philips wants to move out of the current transactional relationship and "To Put Customer First" becomes the first priority for the company.

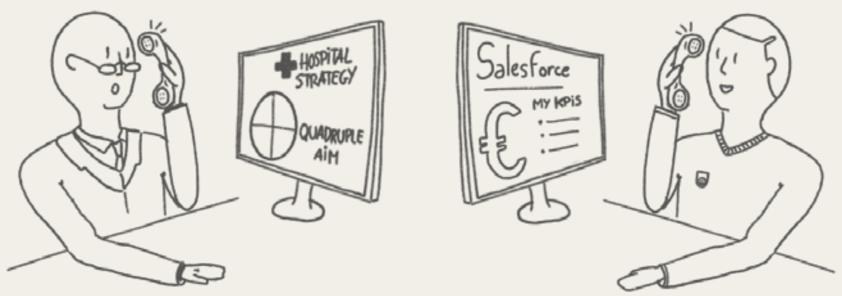
FRUSTRATION AT MACRO LEVEL

Customer Centricity appears to be too vague.

Where is Philips moving towards?

CURRENT RELATIONSHIP

The interaction is not synchronised. The dialogue between an AM and a customer is transactional.



FRUSTRATION AT MICRO LEVEL

ACCOUNT MANAGERS CAN'T FOLLOW PHILIPS AMBITION.

Despite AM receive trainings, they fall into the selling boxes behaviour when meeting the customer.

These trainings are commercial, focus on deal moment and mindset only.

Problem statement:

The dialogue between an AM and a customer is transactional.

- Account Managers trainings are still commercial.
- This education stays in the class moment focusing on a mindset level.
- This education focuses on the deal moments only.

CUSTOMER CENTRICITY AT MICRO LEVEL

What's needed?

Design vision for customer centricity at the micro-level of Account Managers.

Build the path between the current transactional situation towards the desired relationship.

- The area where the problem is laying (trainings and behaviour) is also taken as the opportunity. From now on, the project will focus on:

- What is needed in the relationship (chapter 5), what Philips will do (chapter 6), and how will they implement (chapter 7).

Discussion gate 2

EMPLOYEE EXPERIENCE

Key questions and answers:

- Why improving Employee Experience for customer relationships?
- It is the micro level of organizational design.
- External factors influence employees behaviour.
- Limitting beliefs stop changes from happening.

- The role of design and Employee Experience.
- Design as means to eliminate uncertainty.

This discussion is going to look at organizational design and employee behaviour change in relation to inter-organisational relationships. I wink to the discussion bite 1 on customer relationship because now I pull that thread to discuss how people - targeted account managers - can contribute in improving the relationship between Philips and their customers.

I put the focus in organizational design and employee behaviour change because as chapter 4 introduced, I am working with Philips Account Managers to improve the relationship between Philips and their customers hospitals.
This project assumes that a new proposal in the way Account Managers relate with their customers implies changes in the work dynamic and behaviour of these employees. Here a three definitions of organizational design:

“The process of continual and deliberate alignment of [purpose] with the component elements of an organization: its strategy, its structures, its human resource practices and accountabilities, and its information, control, and decision processes.” - Miller, Greenwood, & Prakash, 2009

“A well-designed operating model is the bridge that allows a company to turn its strategy into results. ” - Bain & Company

“is the practice of bringing a human centered lens to the question of how organizations define and achieve what they set out to do. We do it by looking at what holds organizations back, designing through constraints, and finding new ways forward.” - IDEO

The common ingredient I take is that organizational design is the practise to make a purpose or strategy happen. I take the look at organizational design to scope down into employee experience because in the project it is important to get to the micro level (account manager - customer) (Bidhan & Harrison, 2010).

I pull the practices of behaviour change within the design field (Cash, P., Hartlev, C. G., & Durazo, C. B. 2017). For instance, they emphasize the importance of analysing behaviours taking account the context.
In the case of Philips Account Managers, by combining this literature with other design activities, is clearly seen how external factors such Account Management trainings and Expected Outcomes influence the behaviour of Account Managers (section 4.4).
Another aspect I looked into addressed by (Williams & Fannin 2012) is “limitting beliefs”, *”Belief as something one accepts as true or real; a firmly held opinion or conviction”* When adding the word “limitting” the believer is limitting him or herself without being conscious of it. In the case of Philips Account Manager, I see a connection between the learnings on how external factors plus limiting beliefs influece the current behaviour. Therefore, a limitation for changing the current dynamic (Wegener & Glaser, 2020).

I have seen my role in this project as an ophthalmologist for Account Managers to empathise with their current role and behaviour and help them to be able to face customer relationships in a different way. This is my way of describing it but (Langley, A., & Tsoukas, H. , 2016) explains how designers working in organisations to understand the employees’ problems within it can eliminate colleagues uncertainties. Uncertainties as blindspots that designers can mirror so that the targeted employees not only see differently but also act differently.

“When the partnership becomes the journey” is a reflection of this need to take organizational design as a never-ending practice as (Dunbar and Bechky, 2016) point for taking organizational design as a process. There is a learning process involved.

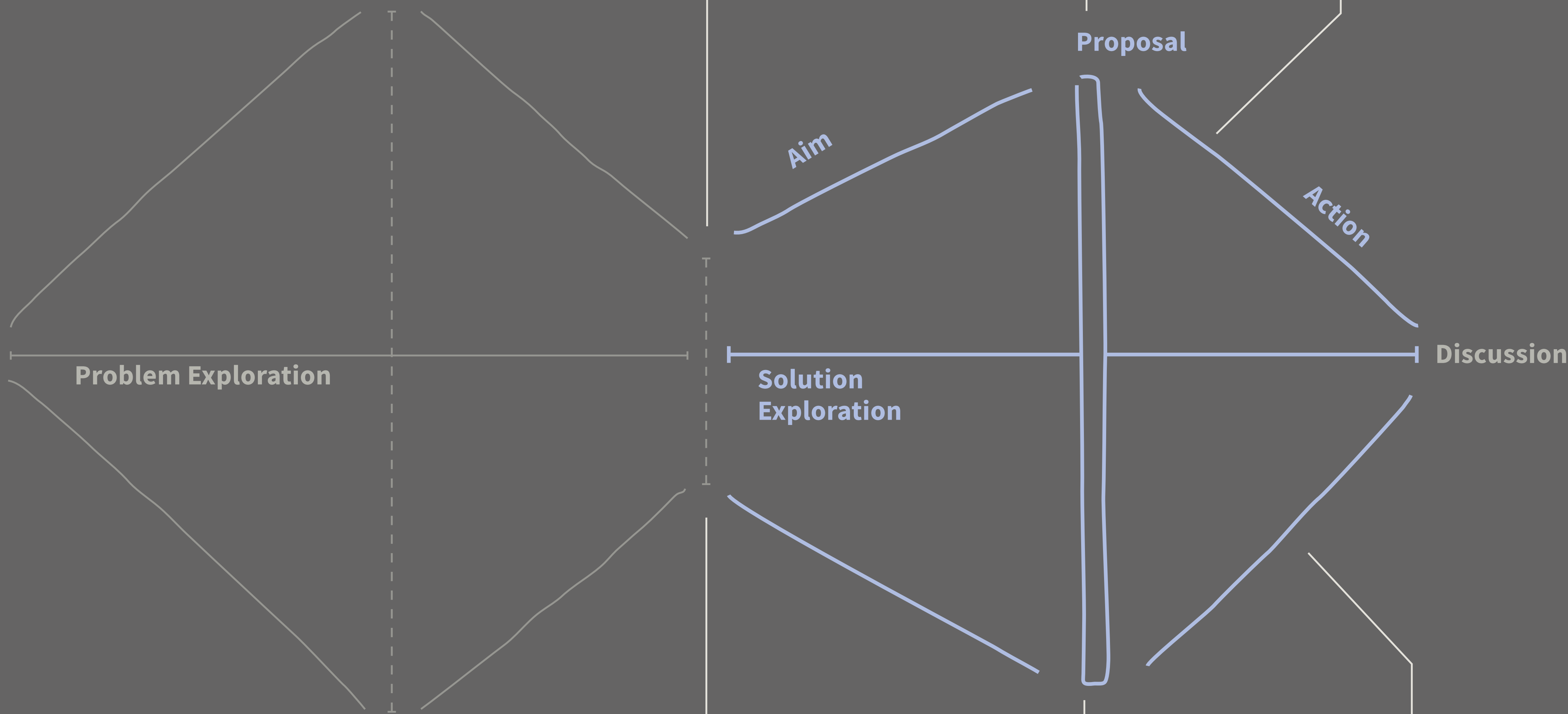
Solution Exploration

Now that the problem was defined, I close the Problem Exploration with the first 4 chapters on Awareness, and welcome Solution Exploration.

Chapter 5
Eventful and Present

Chapter 6
The Partnership Journey Toolbox

Chapter 7
Implementation



These are the callenges that each chapter brings:

To build the path between the current transactional situation towards the desired customer centric relationship.

Help Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

Philips will include "The Partnership Journey Toolbox" as part of the current Sales Managers Trainings.

Aim:

I kick off the solution exploration by presenting the design vision. The design vision will be the means to the design objective.
This chapter's questions is: What is needed?

Proposal:

The proposal chapter does not question anymore but only presents what Philips will do:

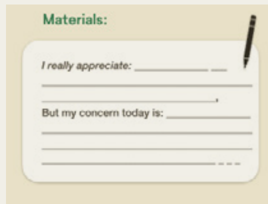
Action:

Still into solution exploration, this chapter within Action, talk about how to implement the proposal within Philips and the adoption of account managers.

Solution Exploration, design decisions overview.

Although the probalem statement was not found at the stage of the experiements explained in the table below, the following requirements persisted along the solution exploration:

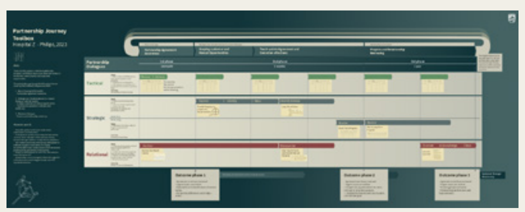
- Create an interface / common point to synchronise and reframe AM & Customer dialogue.
- Provide a holistic experience of the relationship (not only content)
- Define customer centricity for Account Managers.

	Exploring:	Tool:	Stakeholders & Method:	Reactions:	Take-aways story line:
From Content	How to let AMs and customers reflect on current gaps and misalignments.	"Concern Cards" 	(x2) (company supervisors) Customer Experience Design Strategist and Design Partner ----- - (30 min) Online guided use of the tool with guided scenario.	"- IT'S FLUFFY. IT'S NOT THERAPY. - THERE SHOULD BE MORE CONTENT. - HOW COULD WE USE THE INFO OF THE CARD AND DOESN'T STAY IN THE AIR?"	The solution and the problem exploration overlap at this point. At this moment in time, the aim was: TO PUT AN INTERFACE IN THE MEETING BETWEEN AM AND CUSTOMER TO SYNCHRONISE THEIR DIALOGUES AND MAKE THE RIGHT QUESTIONS. Although the problem statement was not clear yet. - The stakeholders saw "therapy" between the AM and customer unnecessary. Although I saw "therapy" or "reflection" as suitable traits for the desired interaction (this was understood during the problem exploration), it was decided to try with the "Agenda Maker".
	How to let AMs step differently into the customer meetings shifting their sales intentions. (This exploration included various iterations).	"Agenda Maker" A tool that helps Account Managers to prepare the meeting. 	(x1) (company supervisors) Design Partner.	"- GOOD - LET'S GIVE MORE STRUCTURE INTO EVERY DISCUSSION TOPIC OF THE AGENDA."	- The "Agenda Maker" was seen as a good way to structure the meeting by all stakeholders, but supervisors wanted (at this point) to focus on the content of the meetings. So the challenge was to figure out what type of dialogue should an AM and a customer have.
			(x1) DMo1. Method: Always the same: Online (30 min total) guided use of the tool with guided scenario.	"- THIS WOULD HELP YOUNG ACCOUNT MANAGERS. - THE OTHERS ALREADY KNOW HOW TO PREPARE A MEETING."	
			(x1) AMo3.	"- IT WOULD HELP TO CERTAINLY KNOW WHAT I SHOULD TAKE INTO ACCOUNT IN EVERY MEETING."	
To Personal Relationships	Explore what would make a good conversation between and Account Manager and a Customer.	These two questions: BETWEEN THE CUSTOMER AND US, I WOULD LIKE MORE CONVERSATIONS ON? WHAT ARE THE ASPECTS WE COULD CHECK TO KNOW THE CURRENT CUSTOMER TEMPERATURE?	(x3) (company supervisors) Customer Experience Design Strategis, Design Partner. Plus, Design Strategist. ----- - In a 15 minutes session, each participant responded to the first questions with notes and then the second one.	"- TRENDS, PORTFOLIO UPDATES, MEASUREMENT, PROJECT REVIEWS, AND MORE CONTENT."	- The wanted conversation appeared to be all made out of more content. My questions here were: if we remove sales in the conversation, where are we moving towards? What should be in the centre of the discussion? What whould be the ingredients of the interaction? Only Content? At this point it was decided to look into personal relationship traits, to understand what characteristics I wanted to use to build the desired dialogue.
			A reflection on their answers was done a week later.	"- IT'S TRUE, IT'S ONLY CONTENT. HOW CAN WE MAKE IT MORE HUMAN?"	

section 5.3

Solution Exploration, design decisions overview.

From Transactional → To Relational

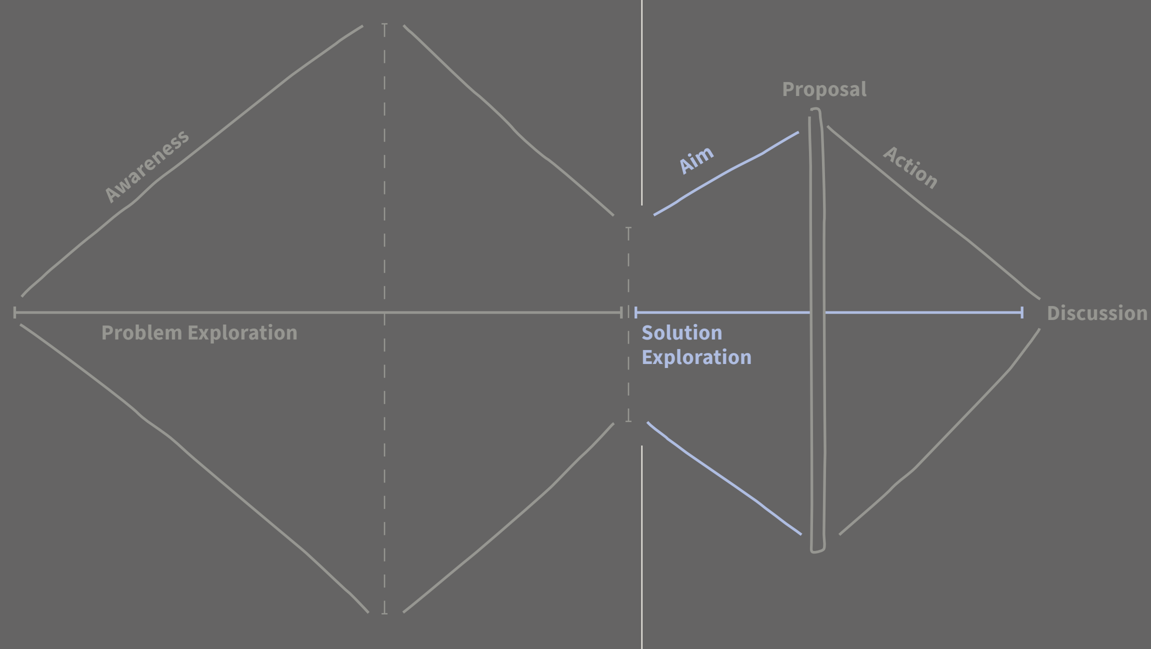
Exploring:	Tool:	Stakeholders & Method:	Reactions:	Take-aways story line:
Explore what it takes to include a tool / interface between the customer and the AM when they meet.	"The partnership model canvas" 	DM 01, and AM01 ----- - (30 min) Online Role Play where the DM01 was the Account Manager and AM01 was a customer.	"- COVNERSATIONS ARE NOT ROCKET SCIENCE. - WE ARE ALREADY WELL PREPARED. - LOOK INTO THE TRAININGS, THERE IS A LOT OF OVERLAP."	After exploring the desired traits (5.3) The tool in this raw was created next to a toolbox of tools. However, the stakeholders in this raw said it was overlapping with the existing resources for Account Management. Therefore, the aim was to understand what are AM learning (this was explained in chapter 4). Connecting with sales stakeholders validated that the proposed toolbox would be very necessary because: pragmatic tools would help AM apply the theory of the training while they meet the customers.
Understand what materials are provided to Account Managers so that they can be more customer centric.	These questions: ARE THERE TOOLS FOR THE AM TO USE AFTER THE TRAININGS?	Sales Excellence Manager	"- TO CREATE TOOLS IS IN THE AGENDA. - AM LOOK AT THE HOSPITAL STRATEGY IN THEIR WEBSITE ONLY... - TOOLS SHOULD BE EASY TO USE."	
	WHAT LEARNING MATERIALS DO WE (AT PHILIPS) HAVE TO PROVIDE TO ACCOUNT MANAGERS.	Principal Design Strategist	"- LOOK AT WISE AND CONTACT THIS BUSINESS PROCESS EXPERT."	
	WHAT IS IT WISE? WHICH KNOWLEDGE DOES IT PROVIDE? WHAT POSITIVE IMPACT IS IT HAVING?	Business Process Expert & Learning Program Delivery Manager	"- TRAININGS ARE NOT AFFORDABLE AND DON'T GET TO ALL AMs. - THE POSITIVE IMPACT OF THE TRAININGS IS BEING MEASURED."	
This exploration requiered to make a chain of engagement with various stakeholders until I got "the sweet spot" by a key leader.	ARE THERE TOOLS FOR THE AM TO USE AFTER THE TRAININGS?	Sales and Commercial Excellence	"- NO THERE ARE NO PRAGMATIC TOOLS BUT THEY WOULD BE GREAT TO EMBED TO THE THEORY."	
Explore what it takes to use the Partnership Journey Toolbox for an Account Manager.	The Partnership Toolbox Guide:  	AM03	"- I WOULD GIVE IT A TRY! - THIS MAKES THE PROCESS SEAMLESS AND HELPS TO PROVIDE ADDED VALUE. - I AM NOT SURE I CAN TAKE THIS TO ALL THE CUSTOMERS. SOME MIGHT THINK, WHY YOU DOCUMENT ALL THIS?"	Although Account Managers hesitate to take the tools to the customer, some of them recognise that the tools would help them to not fall into the old behaviour.
		AM04	"- HOW WILL I PUT THIS INBETWEEN THE CUSTOMER AND I? I WANT TO GET THE ORDER SIGNED, AND HE WANTS TO RENOVATE THE DEPARTMENT."	
		AM02 Method: Always the same: Online (30 min total) guided use of the tools triggering AMs reaction.	"- I THINK EDUCATION IS VERY IMPORTANT, OTHERWISE WE FALL INTO THE SELLING BOXES BEHAVIOUR."	

PROBLEM STATEMENT IS FOUND (chapter 4)

chapter 7 on Desirability

AIM

Chapter 5
Eventful & Present



What is needed?

To build the path between the current transactional situation towards the desired customer centric relationship.

Chapter 5

Eventful & Present

Where is Philips moving towards when leaving the transactional approach?
A design vision is created as means to sustain stronger relationships.
In this chapter the reframing of the situation is presented after understanding the design process followed to cover the missing gaps of the current situation.

5.1 When the Partnership becomes the Journey

In the previous chapters on problem exploration, I conclude that the relationship between an Account Manager and a customer is mainly transactional and that Philips wants to move out of this.
More specifically, Account Managers still behave transactional when sitting with the customer because the educational training is still commercial.

Therefore, the design objective is:
Help Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

In other words, when the partnership becomes the journey will mean a “transformation program” (as Philips calls it) within Philips, since it reinvigorates the company’s Account Management.

Towards a Design Vision:
However, what does “build a customer-centric relationship” mean? Customer centricity is defined by the Philips Customer Experience Manifesto (section 2.2).
In this project, I see “customer-centricity” as the umbrella that advocates a more specific design vision.
Relationships are made from people, ergo Dr. Sam & Joe, not from companies.
Therefore, it is important to define a design vision that supports the people interaction level. So instead of defining how the first priority from Philips in becoming “customer first” can better match the customer, it is more suitable to define what design vision will act as means for the Philips Account Manager and the customer-hospital.

A design vision (presented on the next page) will be the means to bring customer-centricity to the relationship and the account managers. Because what situation does Philips needs instead of the transactional one? The truth is that moving from the current to the desired relationship is understood, in this project, as a journey and not as an endpoint or goal. The desired outcome will not happen overnight because relationships are build by the interaction between humans day after day. Therefore, Philips Account Managers need an anchor (design vision) to be able to move on and start building the relationship today.

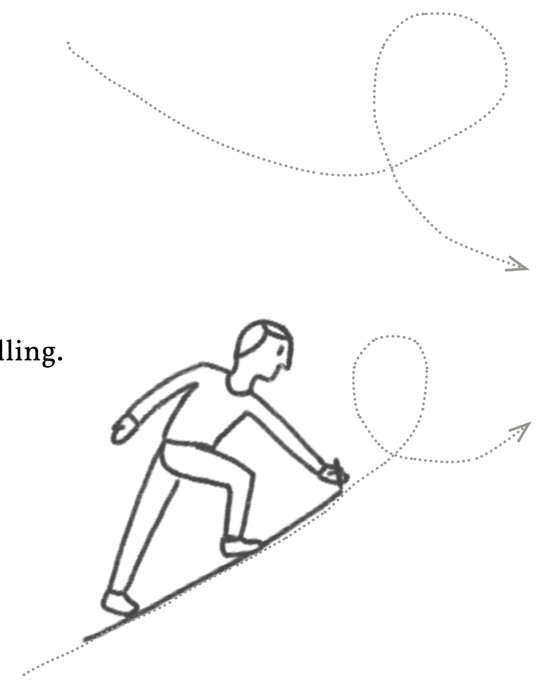
Transactional

From a sales-centred relationship:

- Product value only
- Deal hunting
- Mismatch rhythms
- Customer needs used for selling.

From a sales account manager:

- Reactive
- Persuasive
- Privat



Customer Centric

To a customer centric relationship:

·

·

There is no end point

From a customer centric account manager:

·

·

Design Vision:
To have Eventful & Present relationship and account manager.

Eventful & Present are means to achieve the design objective, so the design vision leads to:
Help Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

In my design vision, according to the key take aways from the problem exploration, the journey needs to have the following points, visualised in the figure:

1 - Eventful Relationship:
The relationship should have consistent over time touch-points so that both parties (Philips and the hospital) meet not only today but tomorrow too.
> section 3.4.1, take away 2 & 3
> section 4.3, pain C & D

2 - Present Relationship:
At the same time, the touch-points should have a purposeful and conscious meaning to build the relationship.
> section 4.3, pains A & B

3 - Eventful Account Manager:
The Eventful Account Manager is able to bring pragmatism to the conversations with the customer to exchange their needs and goals.
> section 4.5

4 - Present Account Manager:
The Present Account Manager will be able to bring space within the conversations with the customer on the multiple important topics to tackle.
> section 4.4

5.2 From transactional to sustain stronger relationships

From Problem statement:

Account Managers lack support to move out of the current transactional dialogues that they have with their customers.

- *Account Managers training are still commercial.*
- *This education stays on a mindset level and lacks pragmatic tools.*
- *This education focuses on the deal moments only.*

According to the design vision:

How might we help Account Managers be eventful and present?

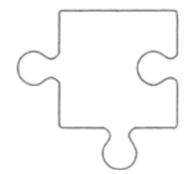
Philips Account Managers can not change overnight and therefore, they also need to take a journey.
As part of the project proposal in building a journey in the relationship, this project aims to be able to start today through the designed tools (presented in the next chapter).

To Solution statement:

Support Account managers to have face to face eventful and present dialogues and sustain them over time.

Today:	Tomorrow:	Later on:
Help Account Managers to make the right questions in the meetings with their customer.	Help Account Managers to move on with the desired relationship with their customers	Shift Account Managers transactional aim into an overtime eventful & present relationship.

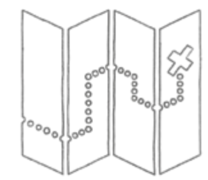
how?



Toolbox

A toolbox with templates to be used during the meetings with the customer in order to MAKE the right questions and have an eventful and present dialogues.

Why this helps?
- The tools act as a common point for mutual success and for the AM not to fall into the old behaviour.
- Philips is in the urgency of improving the customer relationship with seamless and easy tools.



Guide

A guide to help account managers MOVE between meetings and though the relationship towards the assumed desired outcomes.

Why this helps?
- Because AMs jump from one customer to the other with short term plans due to their targets.

Structure

A structure to let Account managers SEE the oveall path and purpose they are aiming with the customer.

Why this helps?
- Because the current Account Managers day to day aim is to get contracts signed.
- Sales reinvigoration.

5.3 Covering the Gaps.

Problem Statement:
Account Managers lack support to move out of the current transactional dialogues that they have with their customers.
- Account Managers education is still commercial.
- This education stays on a mindset level and lacks pragmatic tools.
- This education focuses on the deal moments only.

Design objective:
How might we help Account Managers be eventful and present?

Solution Statement:
Support Account managers to have face to face eventful and present dialogues and sustain them over time:
1 - The toolbox (make)
2 - A guide (move)
3 - A structure (see)

But what tools, guide, and structure?
In the following section, I am going to take you through the design process that responds to the needs of the solution statement.
Claiming that the current training are not supportive enough, implies that my solution will provide the right education points for AM. These points will cover the current knowledge gaps.
But what is missing?

Method:
In order to cover the knowledge gaps and understand what is missing in the current trainings, the following steps were taken.

1 - Research outside Philips what traits do people value from sustained and strong relationships with their loved ones.
2 - Translate the gathered insights from point 1, into meaningful traits-opportunities for AM-customer interaction. These traits-opportunities were mapped in the *Micro Relationship Frame (MRF)* frame that contains in 4 pillars: Knowledge, Context, Behaviour and Time. This frame was created by me in collaboration with Make Meaningful Work company.
3 - Desk research and ideation to define the tools that could materialise the mapped opportunities.
4 - In between the 3rd point, I also validated the trait-opportunities with some Philips stakeholders (both supervisors and Account Managers)

In the next pages I explain each of these steps in depth.

Micro Relationship Frame

Knowledge	Time
Context	Behaviour

5.3.1 Research on personal sustained relationships.

Before explaining this research method I will introduce the frame I used to map the gathered traits.

The MRF holistically defines the desired interaction between an account manager and a customer. There was a point in my solution exploration, where I realised that education was not only about knowledge, and that the missing traits in the relationship were not only missing content or Philips portfolio.
Instead, the interaction between an AM and a customer is missing:
- soft skills (defined in the behaviour pillar)
- a different time frame of the relationship structure (time pillar)
- customer-centric outcomes (context pillar)
- customer-centric knowledge (knowledge pillar).
MMW original frame contains the mentioned pillars. However, I adapted the traits theme within each. For instance, defining that the context pillar would be about relationship outcomes, and the other themes put into brackets.

Once this framework is introduced, I explain you the researc on personal relationships.

Method:
I did qualitative interviews with 20 participants to ask them the following:

What makes a good friendship, relationship or marriage? (interviewees could decide what to answer upon)
Since it is a deep question. I decided to give the question 2 days before the interview. On the day of the interview I asked sub-questions that could align with the MRF pillars.

Reflection:
I found some barriers at this point of the process, where I was trying to bring to the table what Philips needs instead of the current situation. My supervisors were very much focused on content and only getting a trusted positioning I managed to go on with my ideas on what was needed.

Why looking at personal relationships to reframe the current situation:
Because I observed that personal relationships do not put money in the centre, but other values. Personal relationships are sustained over time and I wanted to discover what were the ingredients.

Interviewees answers:		Opportunity trait for Philips:
"You know... small questions: How are you? All fine?" "Care for details".	>	**KEEP AN EYE ON SMALL THINGS.**
"Acceptance in the fact that the aim of the relationship is the relationship itself and not in the other or changing the other".	>	**THE AIM OF THE PARTNERSHIP IS THE PARTNERSHIP ITSELF.**
"Share new things, places, restaurants, museums... also, life events you know?".	>	**EXPLORE THE UNKNOWN EMERGING INNOVATIONS TOGETHER.**

5.3.2 Mapping the opportunity-traits.

The gathered insights from the participants were first mapped into the MMW frame. (appendix).
Secondly, they were translated into opportunity traits for Philips Account Management relationship.
The translation was taking into account the solution statement mentioned in the design vision section (5.2).

How?
The aim of having a toolbox, a guide and a structure, is crossed with the MMW frame.
In this way, I define what traits should belong in every part of the proposal.
This helps to jump into the ideation of the toolbox, the guide, and the structure.

	Knowledge: Indicates necessary new knowledge to be tackled by account managers with the customer.	**Context:** The conditions within "context" embrace the ultimate outcomes that the relationship needs to meet.	**Behaviour:** Key soft skills that account managers should adopt in order to approach the other 3 pillars.	**Time:** Understanding on dynamic over time, and spans of the relationship.
TOOLBOX	EXPLORE THE UNKNOWN EMERGING INNOVATIONS TOGETHER. THE COMMON PURPOSE OF THE PARTNERSHIP AND THE GOALS BEHIND. THE 3 HIDDEN RIDERS. FEAR, RISK & OWNERSHIP. KEEP AN EYE ON SMALL THINGS. AGREE ON THE MOMENTS WHERE PARTIES NEED EACH OTHER AND FOR WHAT. TO RECOGNISE THE ECOSYSTEM AS A WHOLE. TO UNDERSTAND CUSTOMERS SOLUTIONS NEEDS.		- Team player - Holistic thinker - Collaboration - Patience / Impartial - Interviewing	PRESENT AND STRUCTURED DIALOGUES
GUIDE		CHECK-IN AND CHECK-OUT MOMENT. BUILDING THE MEETING AGENDA TOGETHER. RELATIONAL DIALOGUE THE AIM OF THE PARTNERSHIP IS THE PARTNERSHIP ITSELF.	CONTEXT AWARENESS. INDIVIDUAL PURPOSE AND ROLE EMPOWERMENT.	
STRUCTURE		MEETING THE CUSTOMER TWICE A MONTH	MULTILEVEL AND FEARLESS NETWORK.	CONSCIOUS AND SYNCHRONISED TOUCH POINTS OVER TIME

5.3.3 Desk research and Ideation.

Tactical dialogue

1_ Partnership Agreement Performance Metrics and Monitoring.

Goal:
- How are we doing on our agreed performance metrics?
- Extract nagging concerns.
- Tasks update by Account Manager according to KPIs.

Strategic dialogue

2_ Current short-term Projects and Activities.

Goal:
- Review existing projects status and short-term improvements.
- Start co-defining new projects or programs by identifying trends.
- Translate shared trends into opportunities and map them into short, mid or long-term.

3_ Mid-term Projects Planning.

Goal:
- Review existing projects status and short-term improvements.
- Start co-defining new projects or programs by identifying trends.
- Translate shared trends into opportunities and map them into short, mid or long-term.

4_ Long-term Ambitions and Strategies.

Goal:
- Define shared top trends.
- Translate those to shared vision.
- Define bold steps statements.
- How can we help build on you long-term strategy?

Relational dialogue

5_ Partnership Relationship and Aspirations.

Goal:
- How are we doing so far in our partnership?
- Where's the win win.
- Where can we build the partnership towards.
- When do we need each other along the journey?

The defined trait-opportunities in the last section (5.2.2) are used to ideate on the tools, the structure and the guide that compose the project proposal / design.

Ideation methodology:
I mainly carried out 3 cycles of ideation (two myself and the third one with one of my supervisors within Philips). Based on the trait-opportunities I mapped in section 5.2.2, I planned an ideation to see how to turn each trait into a materialised tool, guide or structure.

Firstly,
I made a criteria list that all the ideated pieces had to follow in order to match the design vision requirements with the mapped opportunity traits:
1 - The AMs and customers are able to grasp the aims of 1 tool in a glance. Therefore each tool should be 1 page only and with clear and small titles.
2 - The AM and the customer understand in which order they need to provide the information. Some parts might build on.
3 - There are gaps to be filled in by the customer, and gaps for Philips. But also gaps shared gaps to make the relationship more present and eventful.
4 - The templates trigger AMs to make the right questions since there are specific gaps to be filled in.
5 - The tool is designed in a way that is used by both parties (AM and customer) together at the same time. (not for AM to be filled in after meetings)
(this list was adjusted until the end of the project since more requirements were needed after presenting the proposals to the AMs. This is the case of number 5 for instance since most AM are reluctant in taking the tools to the customer, but this insight will be addressed later on in chapter 7)
Secondly, I started desk research on existing co-creation tools for design and non-designers. I chose to look at the following providers:
- IDEO Design Kit
- Strategyzer
- Board of Innovation
I was hand drawing while doing the desk research. Meanwhile, my criteria (the list) was also adjusted when looking at these sources. For example:
- I found that some tools do not take the user through any steps and it can be confusing where to start from.
- In some occasions, more than one tool is needed for the outcomes that the providers promise. Taking into account that I want the relationship to be eventful and that AMs are not used to use such tools, the aim behind every tool had to be very sharp and seamless to get.
- Moreover, few tools appear to include multiple stakeholders and this is very important in the project.
- Another aspect is that in any of the cases the tools are mapped with a long term purpose. They appear to be used in a single moment. However, according to the requirements of the project, it is important to make the tools have a consequence in the future and also belong to purposeful touch-points of the relationship.
These were the main anecdotes that were reshaping the design iteratively.
In one of the cycles, I also included one of my Philips supervisors because at some point I needed to know more specifically which content to include inside the tools. The trait opportunities of section 5.2.2 were used as themes.
First of all, we clustered them into the 5 pillars shown above defining a Tactical, a Strategic, and a Relational dialogue.

How were the mapped traits in section 5.2.2 used?
The pillar on "knowledge" was the pivot to do the clustering above. So we had knowledge traits belonging to the tactical, strategic and relational dialogues.
This, taking into account the soft skills that the tools aim to trigger. Although this part is less tangible, the templates should trigger AMs to take a different approach.
Then I continued the ideation on my own. On the guide and the structure part, the aim was mainly to understand how the tools can have meaning over time and how the AMs move the relationship forward by using them.

5.4 Reframing the transactional relationship

To better understand the phenomenon of the proposal, here I show the framing of the current situation and the reframing of it, optimal-future situation.
To do this, I use the MMW frame explained in 5.3 to describe the two sides (current and optimal situation) on knowledge, time, behaviour and context.
The current situation is a summarised overview of the problem exploration phase, and the optimal situation contains the knowledge described in 5.3.

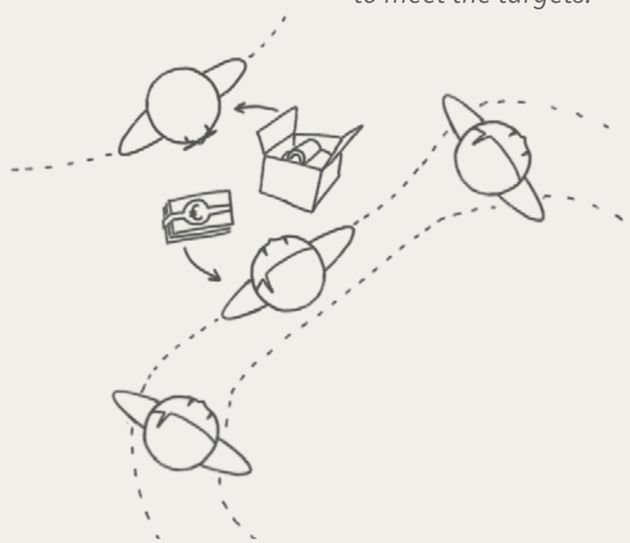
From Problem statement:
Account Managers lack support to move out of the current transactional dialogues that they have with their customers.
- Account Managers training are still commercial.
- This education stays on a mindset level and lacks pragmatic tools.
- This education focuses on the deal moments only.

To Solution statement:
Support Account managers to have face to face eventful and present dialogues and sustain them over time.

From Sales Centred Dialogue
Current situation

Time
from basing the relationship around deal moments.

Context
from the account managers aiming to close deals in order to meet the targets.



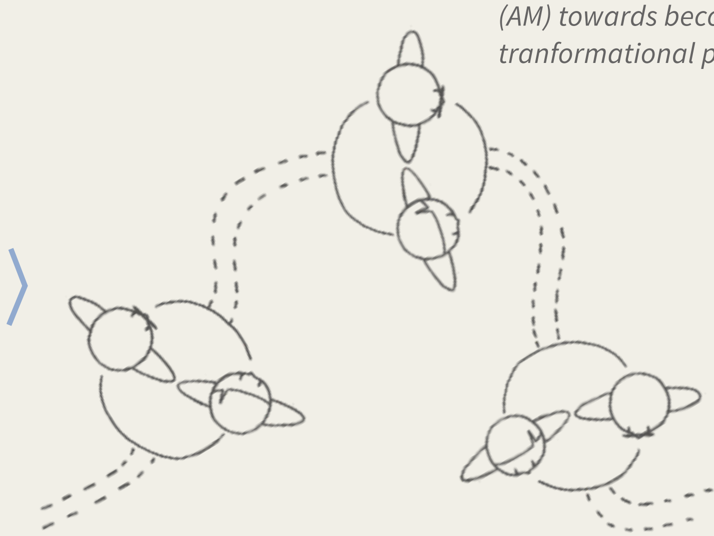
Knowledge
from sales centricity driving the dialogues knowledge

Behaviour
from convincing and being on present only during deal moments.

To Sustained Stronger Dialogue
Optimal situation

Time
To have over time purposeful touch points.

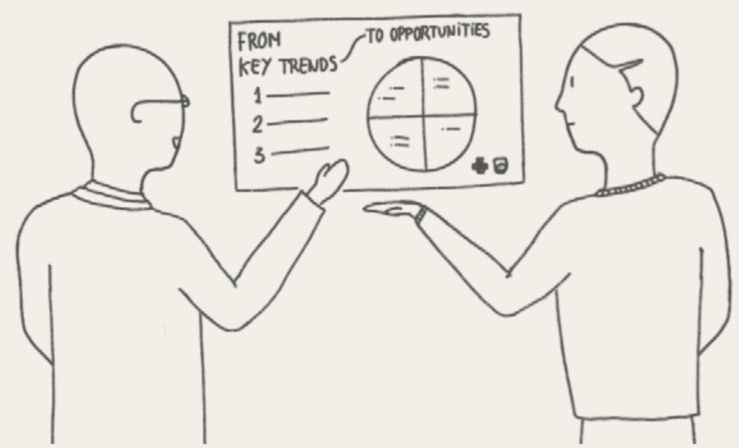
Context
To aim for a mutual success partnerships and self empower (AM) towards becoming a tranformational partner.



Help Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

Knowledge
To have holistic dialogues on tactical, strategic and relational.

Behaviour
To sit one next to the other. Be present to reflect together. Both are seen as partners.



KEY IDEAS IN THIS CHAPTER

Chapter 5
Eventful & Present

PROBLEM STATEMENT

Customer - AM dialogue is transactional

AMBITION'S PATH IS VAGUE

The Transformation from a transactional to a relational dialogue has no end point.

plus

"Customer-centricity" is too general and focuses on the mindset only.

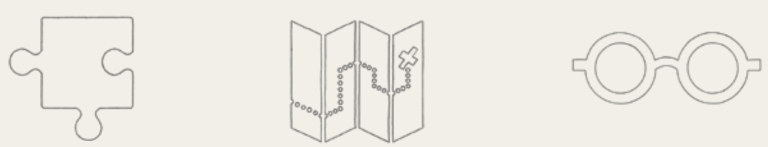
NEED

Eventful and Present Account Management.

WHEN THE PARTNERSHIP BECOMES THE JOURNEY

HOW

Toolbox | Guide | Structure



BUT WHAT SHOULD THIS TOOLBOX, GUIDE AND STRUCTURE BRING?

Personal Relationships traits bring the suitable: knowledge, outcomes, behaviour and time dynamic.

WHY?

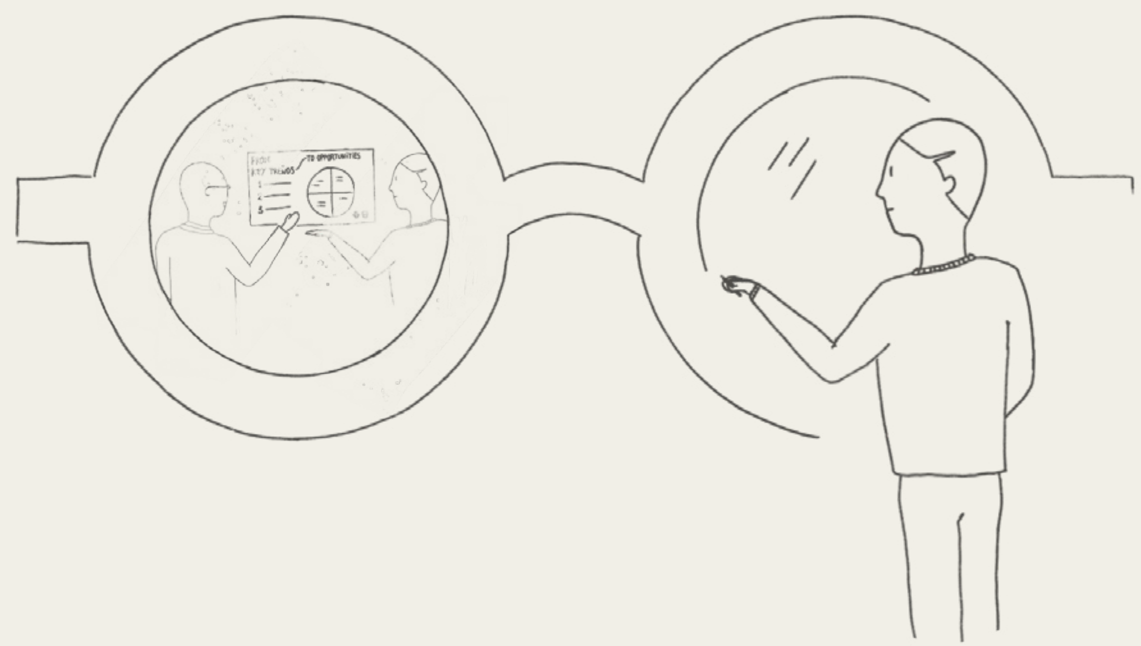
People sustain strong relationships putting the relational value in the centre, not a transactional value as Philips Account Management do.

Solution statement

Support Account managers to have face to face eventful and present dialogues (tactical, strategic, relational) and sustain them over time.

Value of the project:

Help Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.



Discussion gate 3

REFRAMING DIALOGUES

Key questions and answers:

- Framing and reframing,
Framing as process.
- From transactional dialogues to eventful & present dialogues.

- How to encourage Account Managers to co-create with their customers?
Dialogues as Focus
- Simple tools
- Transformative learning

This is the last discussion gate. Belongs to the problem exploration phase to support the proposal with academic knowledge.
The discussion is divided in two parts. The first one is putting the focus on "reframing" and the second one on "dialogues".

Reframing as process:
Reframing "*consists of a way of seeing or representing a situation, but is also suggestive of ways to move or interpret relative to this.*" *(Paton, B. & Dorst, K., 2011).* In 5.4 section it can be seen the framing and reframing undertaken to move from the current situation at Philips (frame), to the desired one (reframe). The project is focussed on customer relationships and more specifically the account manager and customer interaction, is in this micr-level where I refer to dialogues. In this sense, to provide new frames I follow the focus of *(Paton, B. & Dorst, K., 2011) on* conversational interaction. However, as introduced in 5.3 section, the MMW framework was applied to communicate the framing and the reframing. However the suggested reframing involves an individual understanding and actions (account managers) with joint understanding and actions together with theis customers (Dionysiou & Tsoukas, 2016).

Dialogues as focus:
Following the design vision in chapter 5, eventful & present advocate the reframe. Having eventful business partner relationships as over time experiences where the individuals are involved and part of it for being living creatures (Dewey, J. 1934).
At this point it was also important to include Outsiders point of view to the discussion. Remember that the overarching question was: Where is Philips moving towards? In chapter 5 I wonder what should the dialogues include to build a holistic micro relationship between an Account Manager and a customer. The following Outsiders influenced the making of the design vision and solution:

> *"I want to have the feeling they listen. That we fight for the same. And to some extend, I know they need to sell ultimately, but I don't want to feel that, I don't care, it shouldn't be our conversation".*
> *- Dr.Brescó*

=> to listen is the conversation.

> *"My ideal relationship is just one word: collaboration. Talking you to you. My collaborations are a collaboration of friendship. And we normally get the deals while having lunch. I explain him my ideas, my trainings and my projects, and he says alright give me 5 minutes, "pum" and we will do it, and that's it".*
> *- Dr. Brescó*

=> taking personal relationships as reference

> *"So for example a friend who goes in a party with 300 people now in this pandemic and then you immediately think "ok, on this we don't connect" 'cause I think you should be more careful etc... is on this level where a relationship is made".*
> *- The Care Lab*

=> soft skills (from people, never from companies)

> *"Making the map together and clarifying that they needed each other and understanding. This is the "victim" and these the "responsibles", and we gotta get together to make it happen".*
> *- Katinka Bergema from VanWaarde.*

=> "need each other feeling"

> *"It is therapy, it is about we are both here to figure it out." - The Care Lab*

=> reflecting together

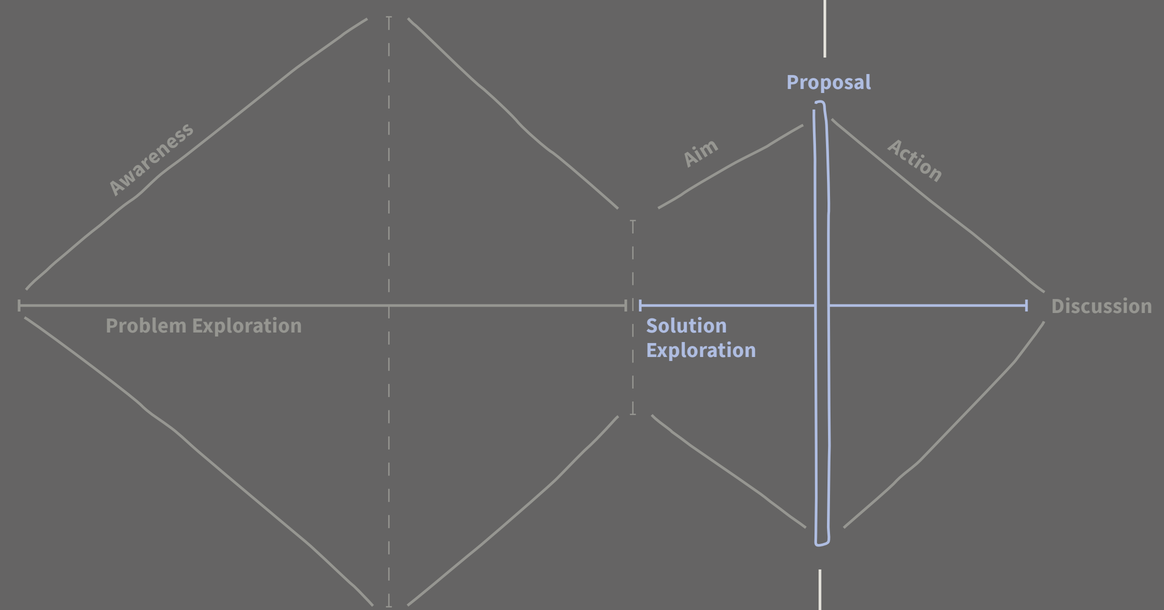
> *"If the intention is shared, then you are willing to compromise or invest your energy. But if the intention isn't... so as if someone wants a sex partner and the other a long relationship..."*
> *- The Care Lab*

=> shared intention, a common point

Tools for dialogues:
From the found problem statement on the lack of support for Philips Account Managers to not fall back into the "selling boxes behaviour", plus, having found that current trainings stay on a mindset level, I focused the solution on creating tangible tools to bring pragmatism in the interaction. (Junginger, 2017) see product development as the key to drive action intead of merly prescribing. Linking this to the theory of "employee experience" I agree with (Junginger, 2017) seeing designers able to generat and employee centred vision that will get the form of a product.
Talking about dialogues involves account managers and customers. Having the mentioned tools within the interaction of these two parties implies to move towards co-creation. While in a customer relationship level in discussion gate 1 I talk about cooperation, in this micro-level I like to talk about co-creation and reflection. (Wegener, Guerreiro, Dankfort, 2019) see *Artefacts can play an important role to stabilize routines as the ostensive aspects of routines (Leutenegger et al., 2018). Such artefacts can be guidelines, visualizations of routines or a flowchart. The (re)design of routines can thus address the design of such artefacts of routines. On the other hand, artefacts can also play an important role within the routine.* In my work I also see artefacts (I call them tools) as an enabler for reflection in action because they are a common point for the stakeholders. What I was looking for in the reframe of the current dialogues, is that account managers and customers have a moment to reflect and take action consequently.

PROPOSAL

Chapter 6
The Partnership Journey Toolbox



Help Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

Chapter 6

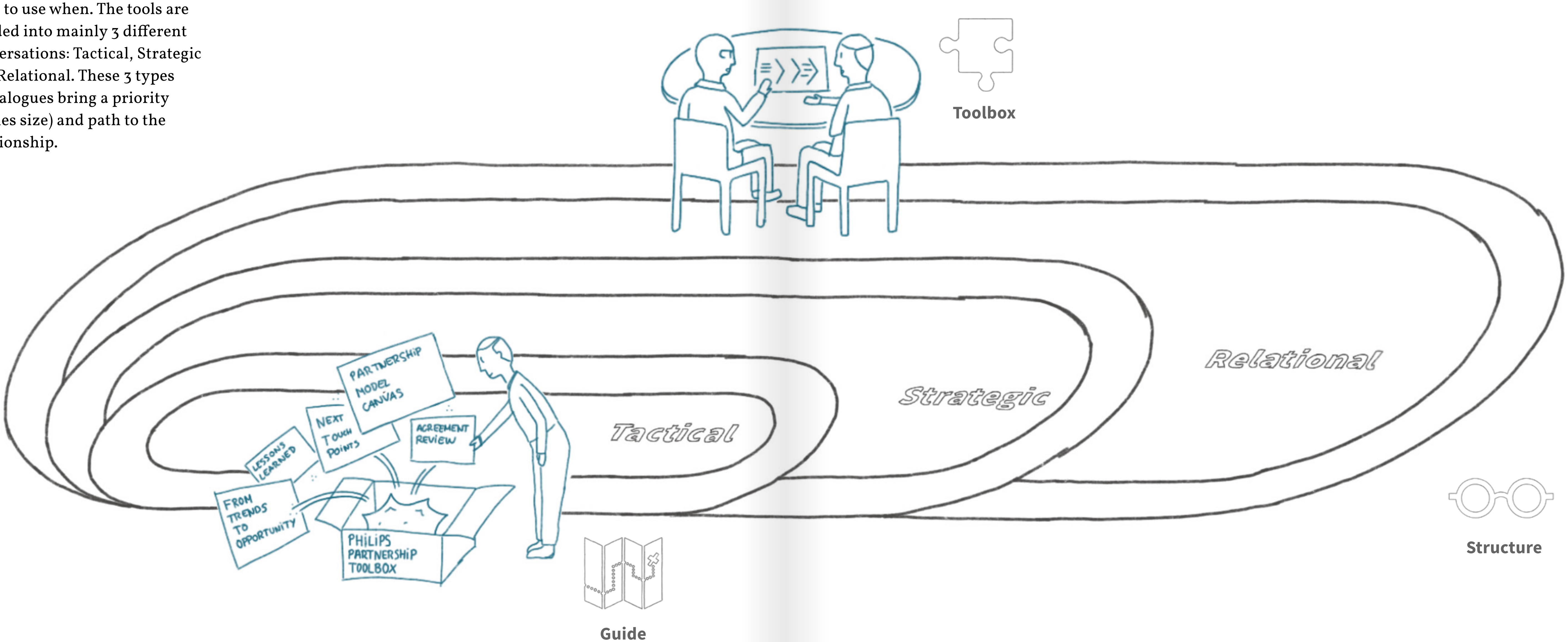
The Partnership Journey Toolbox

PARTNERSHIP
JOURNEY **TOOLBOX**

Help Philips sales managers sustain stronger relationships with their customers-hospitals over time for mutual success partnerships.

6.1 The partnership Journey Toolbox

The Partnership Journey Toolbox in composed of 3 elements previously introduced in the design vision.
Account Managers will have access to the toolbox where there will be a guide to know what tools to use when. The tools are divided into mainly 3 different conversations: Tactical, Strategic and Relational. These 3 types of dialogues bring a priority (circles size) and path to the relationship.



6.1 The Partnership Journey Toolbox

Contextualisation.

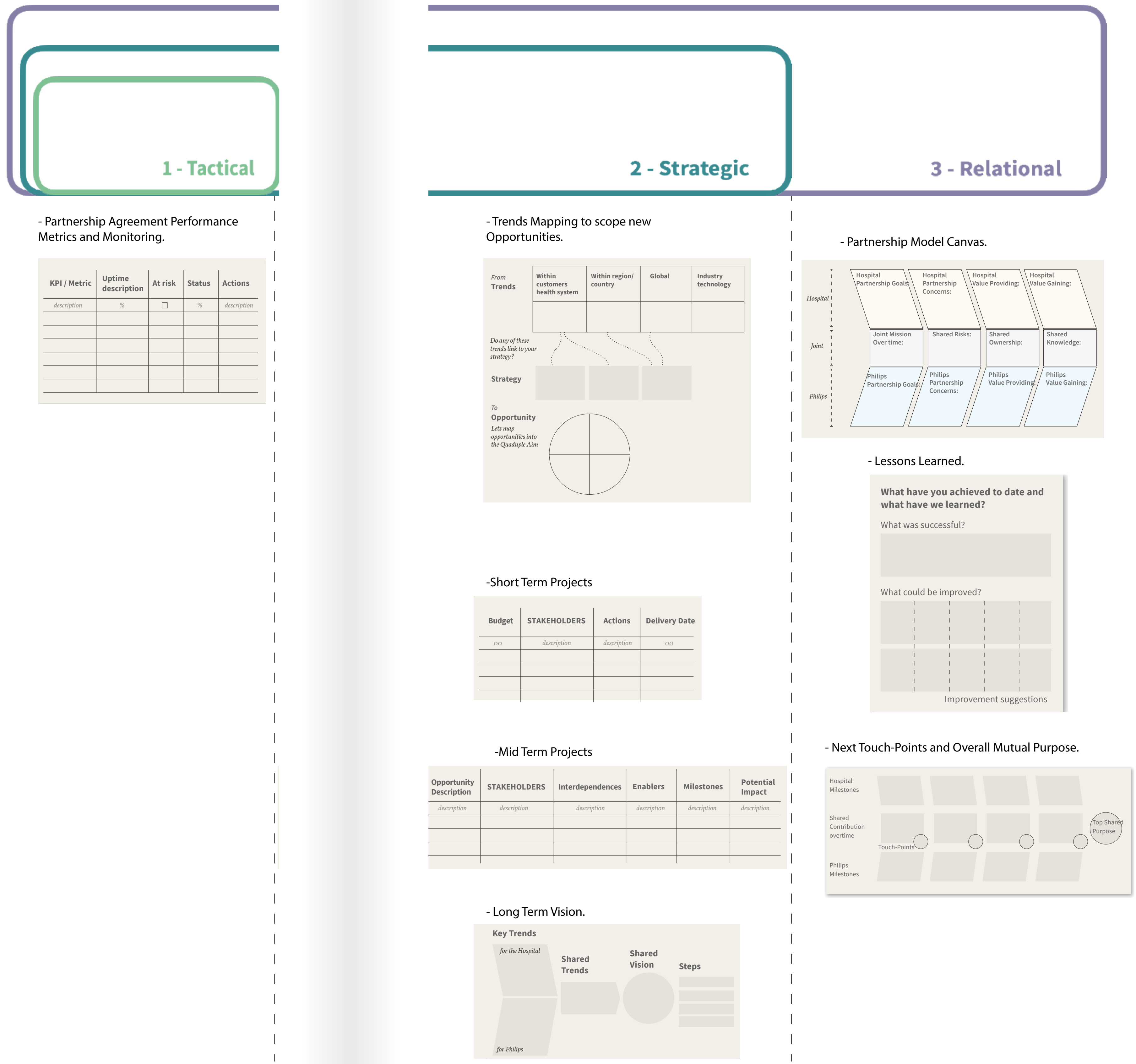
From the process described in section 5.3.2 (opportunity traits translation) and 5.3.3 (opportunity traits ideation) the following tools were defined in order to be part of the Toolbox.

Here I describe the meaning of each tool reminding the ideation in section 5.3.3.

<u>On the Tactical Dialogue:</u>
The opportunity trait “Keep an eye in small things” was turned into the tool “Partnership Agreement Performance Metrics and Monitoring” supporting the Tactical dialogue, because AMs should regularly keep an eye on the basics of the partnership.

<u>On the Strategic Dialogue:</u>
I defined those tools that give a strategic positioning to the partnership by bringing global and industry trends to the table. This then would be translated into new opportunities and business cases. This comes from “Explore the unknown innovations together”, “To recognise the ecosystem as a whole” and, “To understand customers solutions needs”.

<u>On the Relational Dialogue:</u>
The aim is to take care of the relationship itself making sure it is moving to the right direction and stakeholders are not dragging misalignments. “The common purpose of the partnership and the goals behind” and “Agree on moment both parties need each other and for what”.



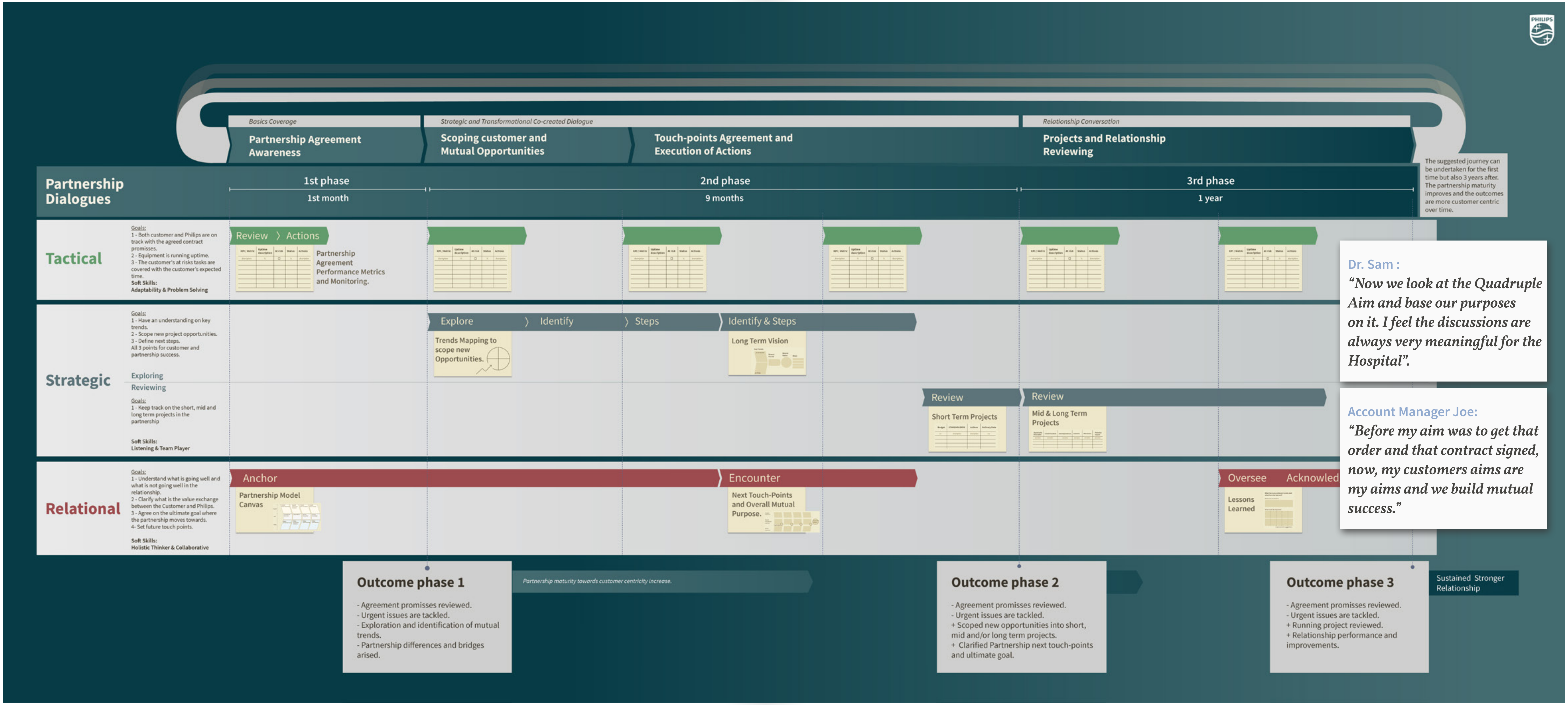
6.1 The partnership Journey Toolbox

The proposal, The Partnership Journey Toolbox, is not an end deliverable but the trigger for a transformation program for Philips Account Management. Therefore, this overview explains how to start today and continue as a loop.

This is how the tools and the 3 types of dialogues take a role over time.
In the first month, the account manager will anchor the relationship by reviewing the agreement and agreeing on the relationship added value.

Together with the customer, they will also start mapping interesting trends for the partnership. The next 3 months will follow with the trends and new opportunities scoping. Moreover, they will review the ongoing projects.

Finally, the AM and the customer will review the relationship. The tactical conversation should always keep going.
This journey is intended to work as presented during the first year, second and third, etc. What changes over time is the maturity of the relationship and the outcomes since the relationship is more and more sustained and stronger.
(a higher resolution version is included at the end of the document)



6.1 The partnership Journey Toolbox

Contextualisation.

The Toolbox tools explicitely facilitate eventful & present dialogues between an account manager and a customer, to sustain a stronger relationship.

Supported Pains
(links to chapter 4):
- Remove sales centricity focus of the meeting.
- Rhythms mismatch (normally the customer moves slower).
- Improvisation and unstructured meeting thread.

Desired Impact
(links to chapter 5):
<u>For the customer:</u>
- Help the account managers look “like a partner” from the eyes of the customer.
<u>For the relationship:</u>
- Improve the engagement between the parties by having a holistic approach (tactical, strategic, relational).
<u>For the Account Manager:</u>
- Bringing more structure to the meeting in order to synchronise both parties.
- Feel more supported and empowered to not fall into the old behaviour.

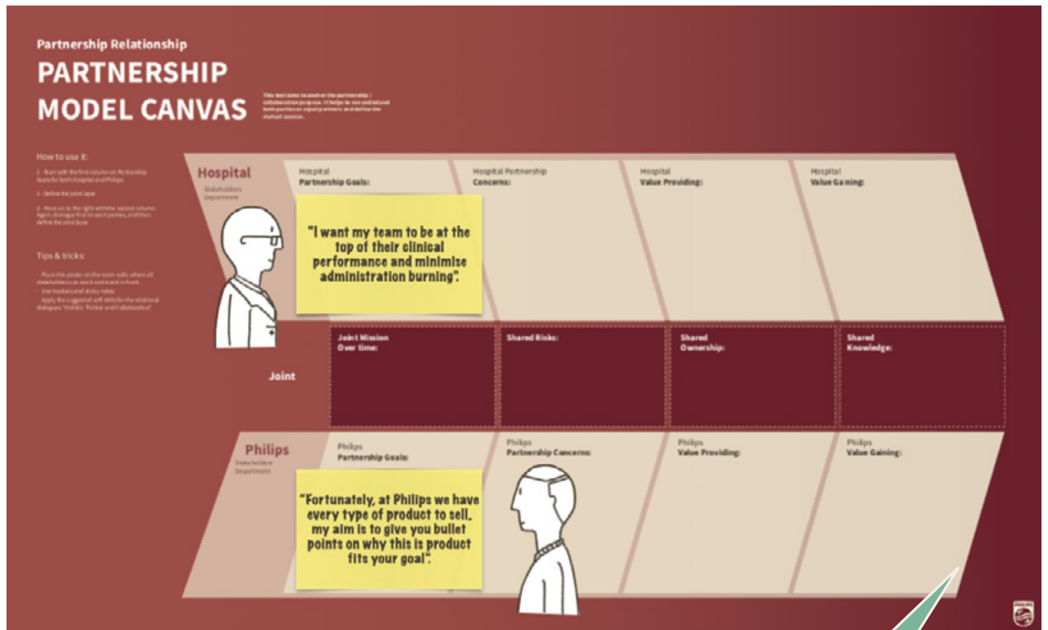
Materialisation:

6.1 The partnership Journey Toolbox

Interaction between Dr.Sam and Joe storyboard.
How change happens?

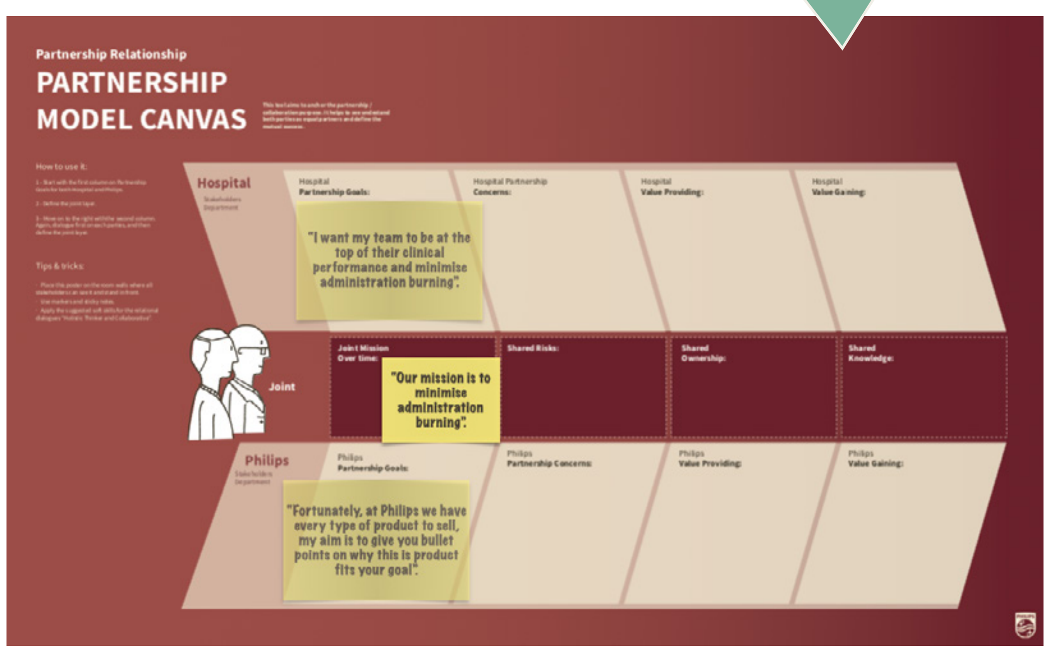
1 - Each party exposes its side.

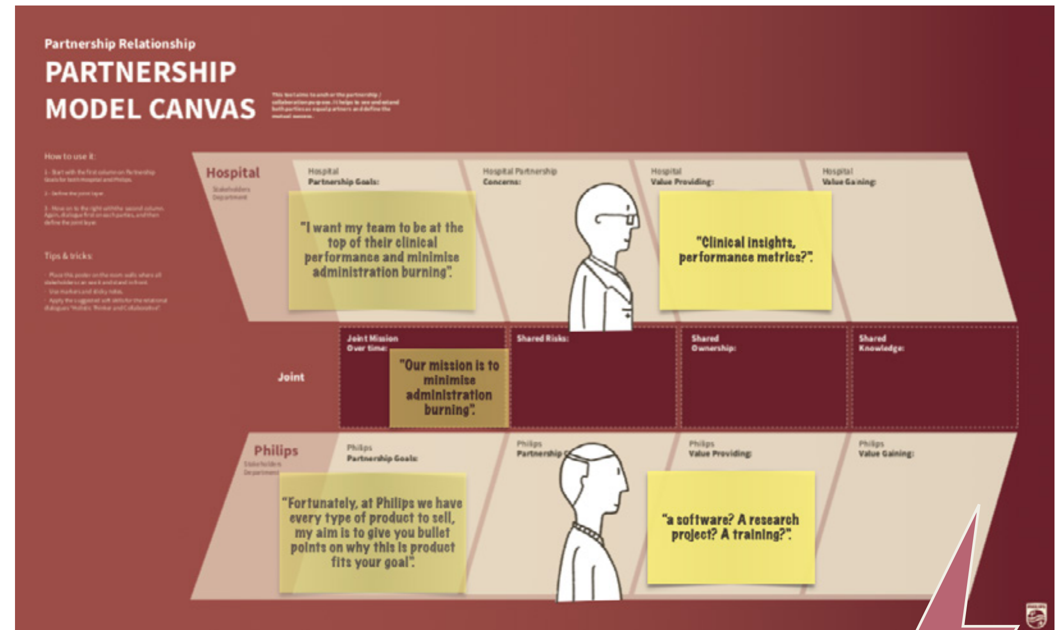
It is okay to have different goals.



2 - Reflection the differences and similarities in order to create the middle shared layer.

Both achieved to get a shared mission.

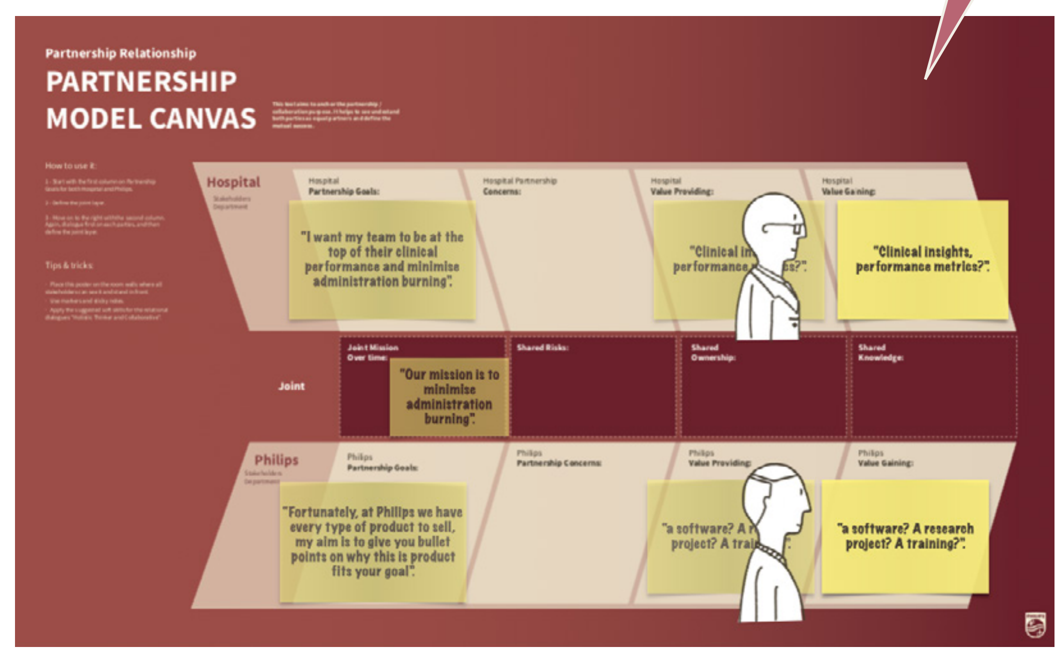




Moving foorward in the canvas:

3 - Stuck in the discussion.

Joe and Dr. Sam can explicitly see the intentions of the other thanks to the tool. This will help them to build alignment and agreement to have a more present dialogue and consequently, eventful partnership.



6.2 Empathising with the future Account Managers.

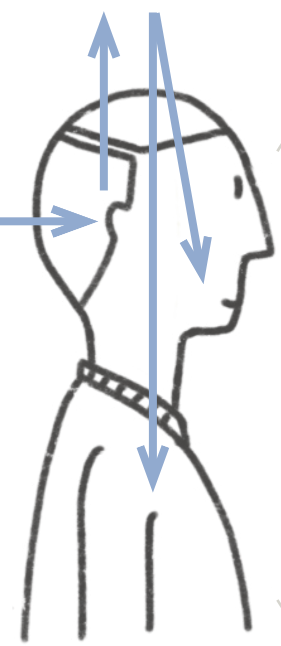
future ACCOUNT MANAGER, JOE

1 - HEAR:

<u>On education:</u>
-Trainings provide The Partnership Journey Toolbox, highlighting the importance of the meetings approach, overall and after-sale relationship.
<u>On expected outcomes:</u>
- The aim of the relationship is the relationship itself
- Customer's goals are Philips goals.

2 - THINK:

<u>On goals:</u>
"We need to build mutual success"
"I am going to listen to Dr. Sam"



8 - SEE:

As a partner.

3 - SAY:

"What value do we both take out of the relationship?"

4 - DO:

<u>On soft skills:</u>
- Team player
- Adaptability
- Holistic thinker

INTERACTION OUTCOME:

· Purposeful relationship.
· Rely on each other.
· Exploring key trends and opportunities.
· Solving buring issues

8 - SEE:

As a partner.

7 - SAY:

"This is my goal, what can we do together?"

6 - THINK:

<u>On goals:</u>
"I want my team to be at the top of their clinical performance and minimise administration burning."

CUSTOMER, Dr. Sam

5 - HEAR:

- Joe's as a partner dialogue.
- Added value

Joe on his role:
"I feel more empowered, ready, prepared to have strategic discussions".

Joe on his behaviour:
"The tools acts as an anchor, interface for me not to fall back into the selling boxes behaviour.

Joe on his knowledge:
"Now I understand the hospital organisational challenges and not only the technology needs or portfolio" .

Joe on his contribution:
"Before my aim was to get that order and that contract signed, now, my customers aims are my aims and we build mutual success."

Dr. Sam :
"If I look back, I remember I was assuming that the type of discussion would be sales centred, but now the value it's on the strategic path and the partnership itself".

Dr. Sam :
"I feel Joe as a partner I can rely on and with whom I can have added value conversations not only based on products but on change management".

6.3 Joe's Journey

As the Account Manager and customer relationship go through the suggested journey in 6.1, the AM will move from being the current trusted supplier to a strategic vendor and to a transformational partner.

This describes long term success in the role of an account manager. However, this adoption requires long term observation.

from

trusted supplier

current

- With the new hospital unit coming, I think that the new CT scan with less uptime would help you a lot.

- Explain me the new key of this scan features.

- The screen is 4k, the icons were redesigned, the installation is much quicker.

- Alright let me think... we need to take into account quite some risks for the projects in the new unit.

- If this scan doesn't fit then I can offer you this one which is much more versatile.

- We have to clarify our needs.

- Then I will call you back with a deal offer.

Behaviour,
6 Soft Skills:
- Negotiation
- Persusion
- Desire to learn
- Territorial & Privat
- Deal quick-witted
- Reactive

6 Interaction Qualities:
- Modality based
- Fast-cooking interaction
- Deal hunting
- Customer needs used for selling
- Unshared conclusions and insights.
- Unclear intentions and ownership .

strategic vendor

adequate/superior

- With the new hospital unit coming, I think that we could map the key needs that you have. Let's take the quadruple aim, what is the key need for each of the segments?

- We aim to offer multidisciplinary care to patients, improve metrics, eliminate unnecessary transfers, and eliminate paper work.

- Alright, I know multiple products and services that together could fullfil these needs. Look I have them in this presentation.

- Indeed I think that the combination you propose could be interesting. What would be the next step?.

- Let me send you a budget and I will also contact HTS to create a project proposal.

3 Interaction Qualities:
- Multimodality business
- Valuable networking
- Solutions propositions.

to:

transformational partner

optimal

- With the new hospital unit coming, I think that we could start a research project.

- From our point of view, we would like to count with a software with x,y,z features.

- I believe that collaborating together to see how can we get this software would be great. I have these tool over here to map key trends, I would highlight these ones... What do you think?

- Trend "b" is a key one for us as well. I would also add "f" we are very interested in this.

- Do we agree that these are 3 key shared trends on software for x,y,z?

- Then we could conclude that our top shared purpose for the project is to "abc".

- Yes, great. Another thing, the other day we also talked about the dyspnea project remember? Shall we look into budgets and clarify who pays what?

- Yes, that's very important. Our main goal is to let the doctors give optimal trainings.

- Alright, tell me more.

Behaviour,
6 Soft Skills (5.2.2):
- Team player
- Holistic thinker
- Collaboration
- Patience / Impartial
- Interviewing
- Self and context awareness.

Experience,
6 Interaction Qualities (5.2.2):
- Synchronised events.
- Value Exchange.
- Win-win relationship.
- Constant evolution.
- Adaptable routines for problem solving.
- Co-create present and future.

KEY IDEAS IN THIS CHAPTER

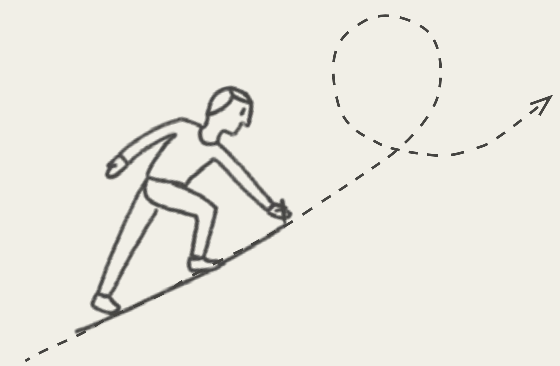
Chapter 6
The Partnership Journey Toolbox

Pragmatic tools support the face to face interaction to let Account Managers feel more confidence to not fall into the old behaviour.

A structure guides Account Managers have the right dialogues over time.

- The relationship and the outcomes would mature when repeating the proposed structure. Although this needs long term observation.

- Account Managers role will change moving towards becoming “transformational partners”.



Philips would start having a sharper understanding of how customer-centricity articulates within the customer relationship.

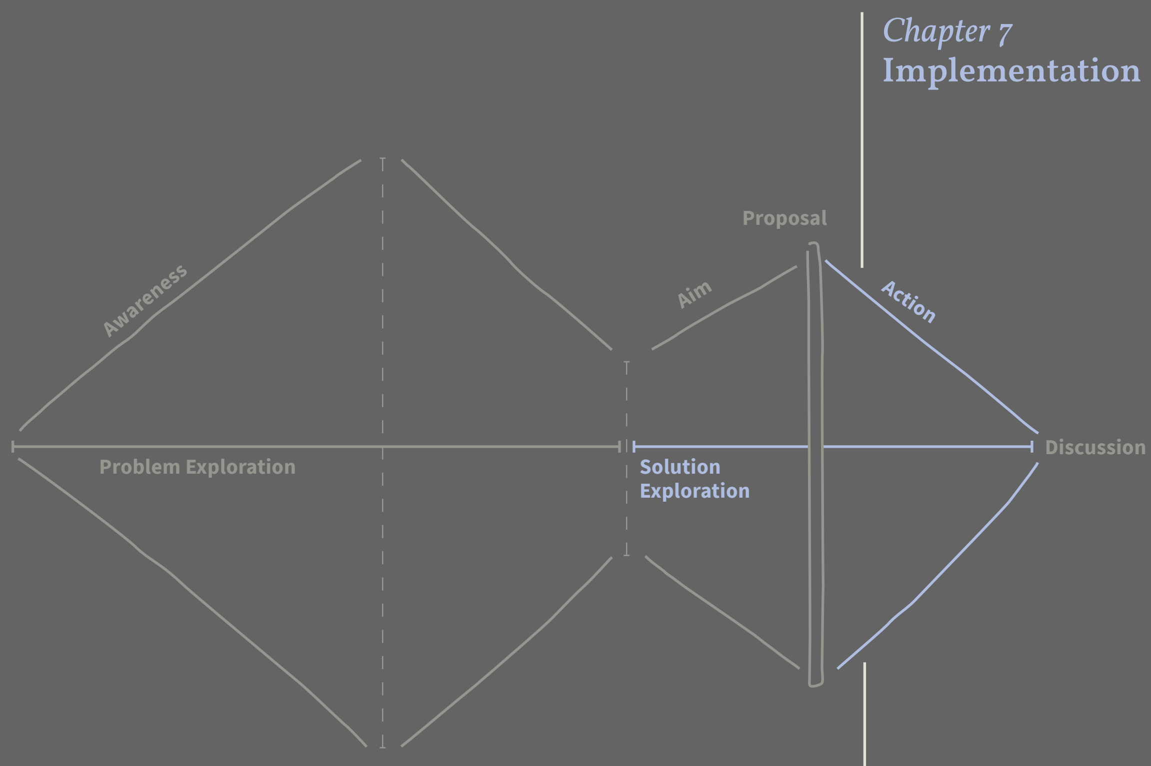
And therefore, where is their position here.

Next step, implementation:

- Account managers feel resistance in taking the tools to the customer, but customer awareness could provide them confidence.

- Philips sees the need of having the suggested pragmatic tools after trainings class.

ACTION



Philips will include “The Partnership Journey Toolbox” as part of the current Sales Managers Trainings.

Chapter 7

Implementation

(sections 2, 3, 4 include project recommendations)

7.1 Why Philips needs to do this?

For Philips:

To increase customer retention. *(main alarm for Philips, section 2.2)*

To develop the understanding of a more customer centric and added value relationship.
(chapter 5 on how to drive customer centricity)

To help sales managers moving out of sales centricity to build more customer centric relationships.
(chapter 4 on account management pains)

The use of design allows to improve employee experience driving customer first.
(seen through desirability)

For Account Managers:

"I understand what you are trying to do. What this makes is to get the added value from the customer and makes the process seamless, and it helps to not fall back into the selling boxes behaviour." -AM03 talking to me

Recognised desirability:
This AM is missing support in following Philips transformation towards customer centricity.

AM - Ah, so to really put it on the table when I'm sitting with the customer?
Cris - Yes,
Am - Ah okey, but it's difficult to discuss it open eh... what is your goal, hm... the customer would say: ok I need a good department with good products, good systems, with good uptime, and then I say: Philips partnership goal is (haha) I want to get the order for an MRI system or a CT, also the contract for service, this is my goal. - AM04 and I

Blind spot:
The project proposal is important to let this AM be in the situation of having to align purposes and exchange of value. The proposal would let the account manager change the dialogue and build purpose over time.

7.2 Feasibility

The presented tools in chapter 6 will be embeded in the trainings for Account Managers.
As explained in the desirability in 7.3, Account managers will be provided with the proposed tools within the training that they currently take.

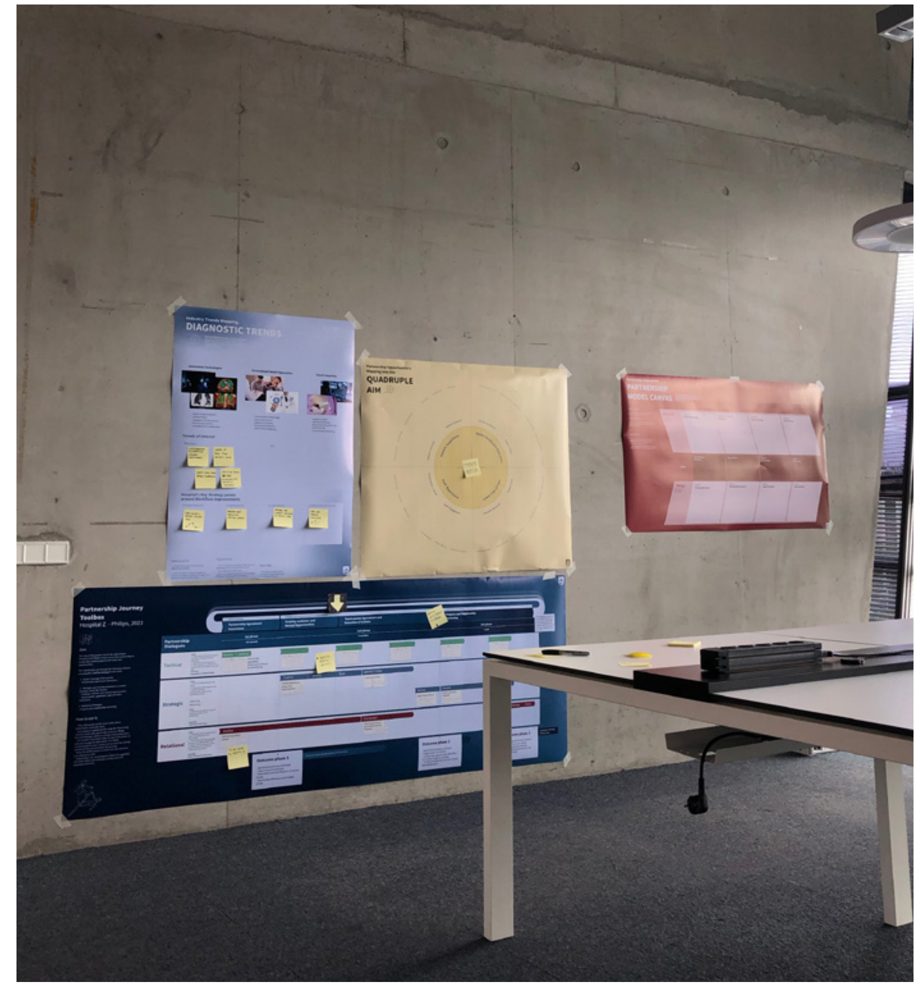
The following materials will be developed:
- Toolbox (canvas and templates to be used with the customer): Pdf and printed version.

- Playbook (tools use description, guidance through the dialogues, before and after meeting preparation for AM): PDF and printed version.

- Slides (overview to explain the transformation program aims and content): PDF, digital.

- Customer Booklet (for the customers to get acquinted with the new meetings approach): PDF and printed.

All the materials described would be available in Salesforce.



Printed version of the Partnership Toolbox tools

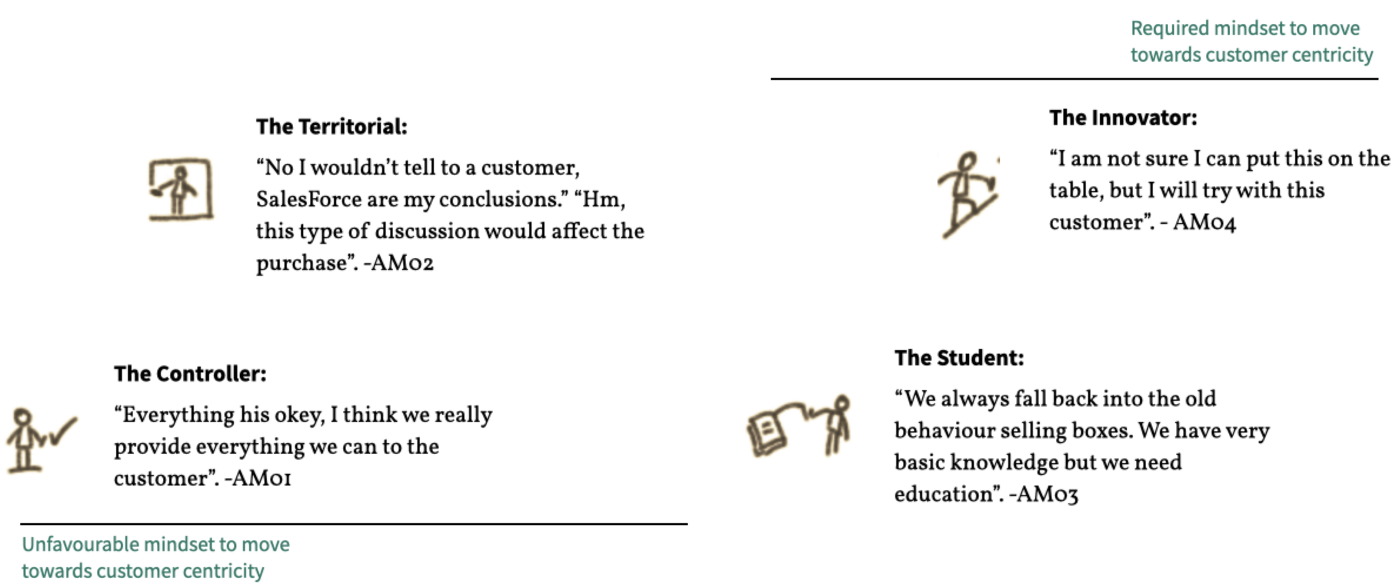
Recommendations in Viability
- The content created during a session should be uploaded into Salesforce to keep track of the insights meeting over meeting.
- Therefore, the gaps to fill in in the tools and in Salesforce should correlate.
- A handy size of the posters is recommended. (A2 max)
- Every district should figure out how to print the tools to take them to the customer. I recommend sending packs to the customers together with the "customer booklet".

7.3 Stakeholders Desirability

Account Managers,
Customer judgement turns into resistance.

During the solution exploration, as mentioned in section 5.0, I did small experiments with account and district managers showing them the proposal.
I identified 4 traits of account managers mindset (figure below) that would determine their adoption. It is not 4 types of Account Managers. They all have a bit of these 4 traits.

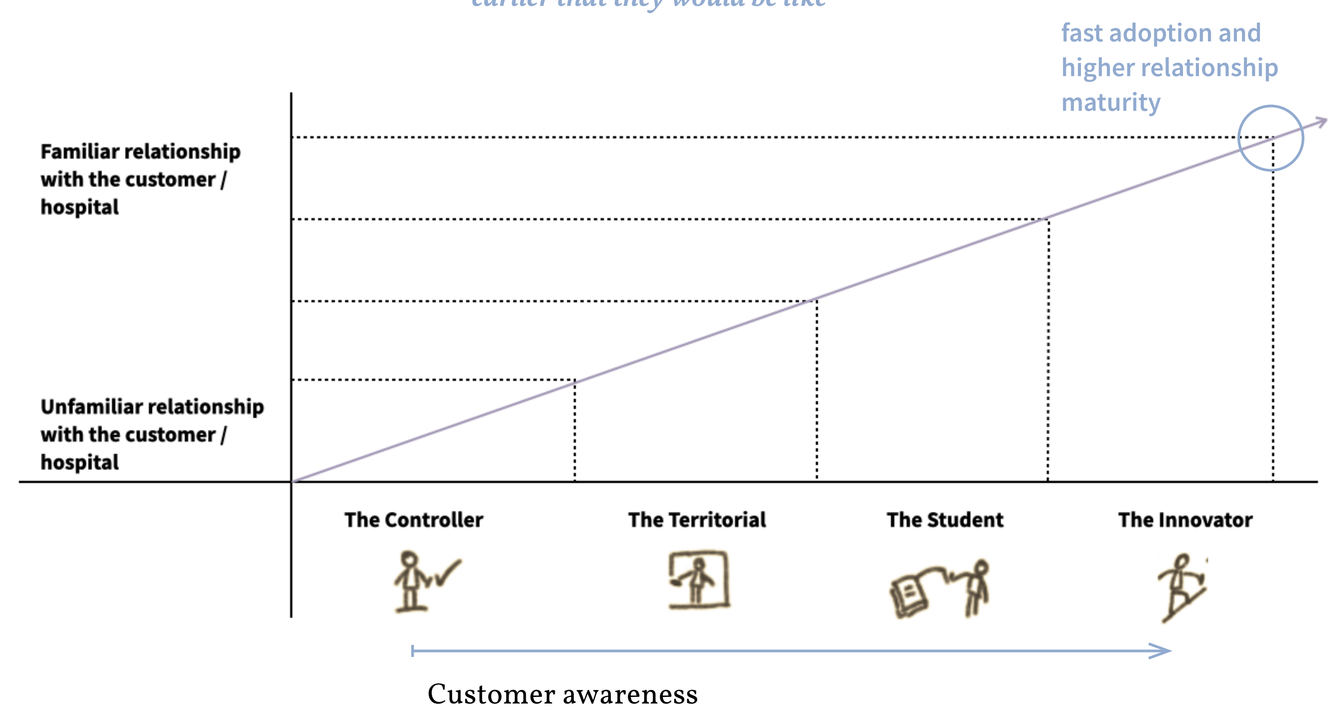
Adoption Barriers:
1 - Feeling comfortable and convinced that the current approach is correct enough. E.g, the controller.
2 - The sales-centric mindset makes an AM be private, build a strategy around how to get an order and protect it from anything that could put it in danger. E.g, the territorial, see the proposed tools as a danger.
"I think it's better if we (account managers) fill it in after the meeting, I have my conclusions and customer shouldn't know". - AM01
3 - Believing that the customer will not be willing to share certain information. This means that the transactional dialogue took over the relationship. According to AMs some customers will say "why are you documenting this?" seeing account managers as people who takes information without transaparency.
4 - Linking with the previous bullet point, AMs also recognise which customers would be more or less open. Hospital executives would be less willing according to them.
- Philips is not the only vendor, but the hospital is mainly buying to other providers.



Adoption Enablers:
1 - An opportunity to not fall back to the "selling boxes behaviour". eg, student
2 - Being able to sell more while building a relationship with the customer.
3 - Having a doctor or head of department in mind that is open to have a different dialogue (this makes AMs feel more comfortable, solving point 3 on barriers).

The Key barrier:
The shared resistance found amongst all interviewed AMs is due to feeling uncomfortable in taking the tools to the customer.
AM - I'd need try it! I would give it a go! The only thing is that I'm not sure it would work with every customer. End user such doctors and heads of departments yes, but next level up with directors, manage, executives may say "Why are you documenting all this?"
AM would answer - The only reason is commercial, as Philips we document all this to be able to sell more in the future. So it might make the customer thik this. I am saying this as a matter of perception from the customer.
Cris- I would expect the following response to the customer: We are building a relationship and partnership by using the tools, see what is the added value, not product value but transformational level.
AM- *Totally agree, but you think on the perfect situation. And yes, there would be customers this wouldn't be an issue, but others, as I was saying earlier that they would be like what's this?*
Cris- So then you would take this to what you call "end user"
AM- *Yes I would!*

Overcoming resistance:
As shown in the figure below only innovators together with an open customer would have a smoother adoption. However, I consider it important to empower all account managers to feel more innovators.
1 - Make a booklet to let customers be more aware of the new approach of account managers.
2 - Let AMs start with those customers they feel comfortable with while they get used to the tools.



7.3 Stakeholders Desirability

Sales Excellence,
From class to hands on.

From the trigger mentioned in section 4.4 and networking with multiple stakeholders around training, I was introduced to the Sales Excellence trainer of the Philips University. My supervisor and I presented the proposal and she was enthusiastic about it.
At Philips, Sales Excellence defines required capabilities. These capabilities are given to Philips University to be deployed and materialised.

"Oh perfect, this would give them something proactical tu use after the class". - Sales Excellence Trainer in the Philips University.

Head of Sales for International Markets
From MRI to solution.

One of my supervisors suggested to talk with this role as we needed his green-light. He was engaged from the beginning giving hands-on advice which meant more than a green-light for this project to become a program within Philips.

"So first let's socialise with Philips University and try to test with the 50 accounts, iterate on it". - Head of Sales for International Markets.

"Also distributors, when we (Philips) don't directly talk to the customer, this could help". - Head of Sales for International Markets.

Recommendations in Desirability
- For Account Managers: I think it is important to choose few active accounts and connect with the Account Managers. Establish a relationship with them so that they feel as much supported as possible when taking the tools to the customers.
- As explained in Feasibility, and Account Managers' Desirability, a customer booklet is highly recommended to make the adoption of AMs easier.
- It is important to connect with more stakeholders that currently hold training and education within Philips such as the Human Resources Department, to embed the tools more easily and create long term impact.
- It is also key to see how customers are receiving the initiative. Having some interviews with them after the pilots would provide great insights into all the transformation programs.

7.3 Viability

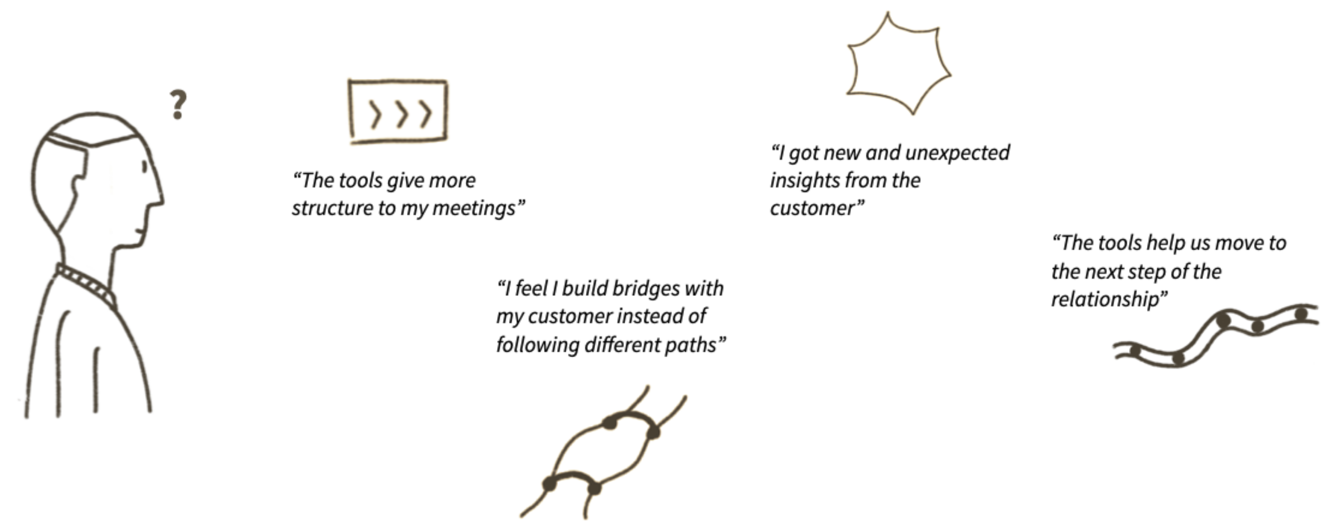
As long as the pilot outcomes are successful it will be embeded into the Philips business system.
It will be viable as long as it helps philips to improve on the quadruple aim (macro level) and to sell solutions for account managers (micro level).

A qualitative answer:
1st - Account Managers need to acknowledge. -"The format has helped me to change the dynamic of the interaction with customers".

2nd - In 2 years we see a growth in sales in an account.

There is the top 50 international customers that will be reached out to run a pilat and test out The pilot is going to take 2 months.

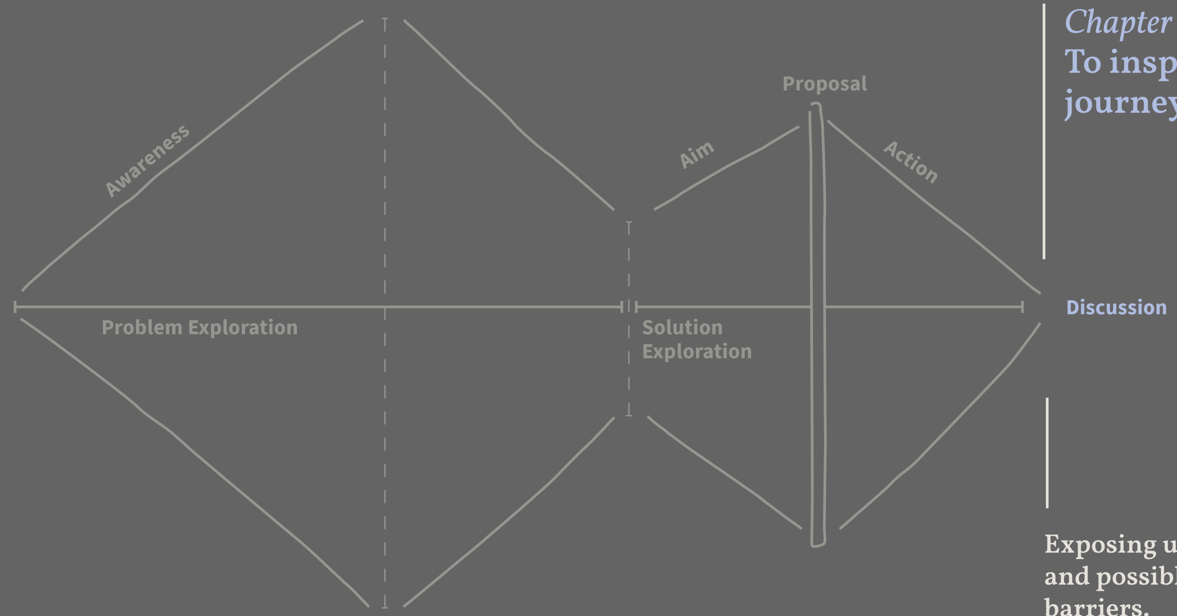
Cost:
5-10k to update trainings an embed them in sales.



Qualitative recommended tested targets for Account Managers during the Pilot.

Recommendations in Viability
- It is important to have a close relationship with the Account Managers of the Pilots to get the described qualitative answer.
- For this reason, it is recommended to have short qualitative interviews with Account Managers soon after they met their customers.
- The viability insights should also be discussed with those stakeholders within Philips that are close to the strategy of the company. Because there is no endpoint (chapter 5) and the journey is uncertain although desired by Philips, it is important to see how viable is to have this new approach in the next 2 years.

DISCUSSION



Chapter 8
To inspire other journeys.

Exposing uncertainties and possible future barriers.

Chapter 8

To inspire other journeys.

- Personal Relections
- Process Discussion
- Solution Discussion
- Conclusion

Personal reflection

The first word that comes to my mind is love. Thinking further, love had the role of bringing compassion to the workday after day. But I also have a feeling of pursuing a passion after all.
Because confidence has been the main personal aspect that shook. Where there was not enough love (confidence) there was fear of screwing it, since I constantly felt something was pulling from the back.

Although there has been one path, and this has been the process and results, I know a better path is possible. The frustration of imagining myself with a certain attitude or achievement but then seeing that that was not happening. These are good news, my psychologist told me that the fact that I can imagine and recognise another path or another Cristina is because I have it, however, sometimes it is covered.

The role of my intuition is also important in the project. I think my intuition is really "fit", however, communicating it better could help others understanding it, since sharing it is good.

Moreover, there are still some things I don't understand, but I do see why they didn't work or came out at the moment (confidence and communication mainly). The truth is that I would have appreciated acquiring more balance between "my way of working" and "TU Delft way".

I felt that being in a company and especially being at Philips motivated me a lot, not only for the challenge but also for the environment (despite the global health circumstances)

All the struggles are learning, I feel very proud and happy. I know I am better, in project management, in knowing my soft and hard skills, and in tackling a wicked problem through design.

I am looking forward to deepening my personal reflection in the next days after being graduated.

Process reflection

The muddy path instead of the highway.

Taking ownership during the process has been the stone on the way. The explained personal reflection directly influenced the project process. In this sense, the project process has been blurry and unclear. While at the beginning I was dealing with a lot of information and I was methodologically analysing, the after midterm had uncontrolled intuition perhaps. I feel I couldn't be so sure of the steps at that moment, but of course, more structure would have helped. Moreover, the fact that I see a lot of nuances, takes the focus out. However, although the process management was delaying the project, the extra time allowed to find a sweet spot and problem as perceived.

From macro to micro.

The process followed to tackle the given problem also deserves a reflection since it can be relevant for other occasions.
The thesis had this overarching question from start to end: we want to move out of here but what is it where we want to move towards? Now, a move from the macro-company perspective to the micro-person level, was key to answer the question. At the macro level, it is important to realise key context barriers and have a holistic overview of the relationship (Philips- Hospitals in this case). However, as I largely mentioned, it has been key to realise that inter-organisational relationships are made from people, and therefore, it is required a close look at key stakeholders, empathise and experiment with them. Moreover, it has been key that the designer (me) not only understand the future aim but mostly, that he/she puts the enablers from today onwards.
Another finding of the process is that engaging with people is very important. However, good use of the information gathered makes the engagement truly valuable.

Solution reflection

The solution space

- In front of the transactional situation, the solution is relational and qualitative. Relational because it humanises the centre of the relationship. While the given situation moves around money and sales. The solution puts presence and events in the centre. Qualitative because this relational approach can not be measured quantitatively. Instead, the stakeholders will need to acknowledge how is it going.

- The paragraph above, gives then answer to customer-centricity. While the understanding of it at the micro-level was vague, the importance lays in how the relationship stakeholders relate with each other. The starting point is in the micro-level. However, the macro one can nourish from it, culture nourishes.

- In this sense taking the journey is a key guide towards customer-centricity. It manifests the importance of taking action today, to get to a yet undefined future. Because customer-centricity might seem the future, but I am sure Philips has something more special to offer that needs to be discovered.

- The solution also looks at the terminology used. What is it to partner up and for what is this word used? or what happens when the word sales are removed? These can be subtle changes but on a daily basis might affect the mindset of a lot of stakeholders.

- It would be interesting to do more employee experience, work closely with employees to see how can they deliver the assumed desired impact and also follow the company strategy.

Limitaitons and further questions

- Although the project focuses on training and education, I see incentivisation as the key push. Because as long as an employee is valued when he/she delivers X, this is going to be its main goal.

- Also, I am not sure I like to use the word customer. It looks like it implies that one buys and the other sells. Despite Philips will continue selling, “customer” comes from the transactional culture. I would like to see all the parties as partners as both receive and get something.

- In this project, I focussed on Account Managers and stayed at the micro-level. But I recommend starting moving out of this level at some point. On this occasion, I would find District Managers. What is happening with them according to the suggested solution? AM are not alone, so the next challenge would be to understand their ecosystem.

- I took incentivisation and education as key external factors for account managers to behave the way they do, but there might be others.

- Still, how to break the silos? The solution might help AM to be more knowledgeable and therefore, be able to engage with people from multiple levels, but this is not enough in a siloed company like Philips.

- Are AM the main reason for low customer retention? I have this question but this is under investigation at Philips.

- Another open question is to see in what way AM will change, what is the suitable role for them? In this case, I think certainty will come from the micro-level experiments.

- And finally, customers should also have a say. How is the customer perceiving the relationship? What are their relationship needs?

Conclusion

Thesis aim

This thesis aimed to create a solution space for the wicked problem that Philips is facing: How might we have a more customer-centric relationship?
The project identified a sweet spot in the education training of Philips Account Managers. Despite AMs receiving training, these are still commercial and focus on deal moment and mindset only. Therefore, the AM who participated in this project appeared to still fall into their transactional behaviour.
However, behind the overarching questions, the project pulled a second challenge: Philips wants to move out of the transactional approach, but where is it moving towards? This question was key in order to know what type of approach, knowledge, skills and experience should the desired interaction between AM and customer have instead.

Findings

The findings recall the project approach of moving from a macro to a micro level.
Starting the project at the macro level could blur the findings but it was found the key to realising the mismatch in the roles of the relationship and how siloed are these roles. But this level was too broad, so focussing on AM was key to move on. In them, the transactional Philips culture manifests cristal clear. These 3 questions were key to empathise with Account Managers: what are AMs working for? What are AMs learning? What soft skills do they apply?
Once the problem statement was clear, I found that the answer was relational although it was tough to articulate it within the company. For this reason, I found key to look at personal relationship traits and apply them to the AM - Customer relationship.
Moreover, and in parallel, the answer to “how to become more customer-centric” was getting sharper by defining the means to it. To build the enablers for today and tomorrow because there is no endpoint. Therefore, it was found that bringing more pragmatism does not only help the meetings in being more present, but it also shows that the desired mindset is easier to apply.

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Appendix.

Find it in a separated document.