

Appendices

Customer Experience in Technology Consulting

Expanding the capabilities of technology consultants
through the adoption of a customer-centric approach

Master thesis
Frédérique Valk
September 2023

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APPROVED PROJECT BRIEF

DESIGN
FOR OUR
future

6327

TU Delft

IDE Master Graduation

Project team, Procedural checks and personal Project brief

This document contains the agreements made between student and supervisory team about the student's IDE Master Graduation Project. This document can also include the involvement of an external organisation, however, it does not cover any legal employment relationship that the student and the client (might) agree upon. Next to that, this document facilitates the required procedural checks. In this document:

- The student defines the team, what he/she is going to do/deliver and how that will come about.
- SSC E&SA (Shared Service Center, Education & Student Affairs) reports on the student's registration and study progress.
- IDE's Board of Examiners confirms if the student is allowed to start the Graduation Project.

! USE ADOBE ACROBAT READER TO OPEN, EDIT AND SAVE THIS DOCUMENT

Download again and reopen in case you tried other software, such as Preview (Mac) or a webbrowser.

STUDENT DATA & MASTER PROGRAMME

Save this form according the format "IDE Master Graduation Project Brief_familyname_firstname_studentnumber_dd-mm-yyyy". Complete all blue parts of the form and include the approved Project Brief in your Graduation Report as Appendix 1 !



family name Valk
 initials FAE given name Frédérique
 student number 4604148
 street & no. [REDACTED]
 zipcode & city [REDACTED]
 country [REDACTED]
 phone [REDACTED]
 email [REDACTED]

Your master programme (only select the options that apply to you):

IDE master(s): IPD Dfl SPD

2nd non-IDE master: _____

individual programme: _____ (give date of approval)

honours programme: Honours Programme Master

specialisation / annotation: Medisign

Tech. in Sustainable Design

Entrepreneurship

SUPERVISORY TEAM **

Fill in the required data for the supervisory team members. Please check the instructions on the right !

** chair Sylvia Mooij dept. / section: MCR
 ** mentor Sijja Bakker-Wu dept. / section: MCR
 2nd mentor Manuel Knott
 organisation: Ernst & Young Global Limited
 city: Amsterdam country: Netherlands

comments (optional) Sylvia is specialized in marketing & has experience with supervising students graduating at consultancies. Sijja is specialized in branding and has coached me before during a qual. research project, which will be helpful now as well.

Chair should request the IDE Board of Examiners for approval of a non-IDE mentor, including a motivation letter and c.v..



Second mentor only applies in case the assignment is hosted by an external organisation.



Ensure a heterogeneous team. In case you wish to include two team members from the same section, please explain why.

APPROVAL PROJECT BRIEF

To be filled in by the chair of the supervisory team.

chair Sylvia Mooij date 02-03-2023 signature

CHECK STUDY PROGRESS

To be filled in by the SSC E&SA (Shared Service Center, Education & Student Affairs), after approval of the project brief by the Chair. The study progress will be checked for a 2nd time just before the green light meeting.

Master electives no. of EC accumulated in total: 0 EC YES all 1st year master courses passed

Of which, taking the conditional requirements into account, can be part of the exam programme 0 EC NO missing 1st year master courses are:

List of electives obtained before the third semester without approval of the BoE

ID4070 IDE Academy (4,0)

name Robin den Braber date 13 - 03 -2023 signature RdB

FORMAL APPROVAL GRADUATION PROJECT

To be filled in by the Board of Examiners of IDE TU Delft. Please check the supervisory team and study the parts of the brief marked **. Next, please assess, (dis)approve and sign this Project Brief, by using the criteria below.

- Does the project fit within the (MSc)-programme of the student (taking into account, if described, the activities done next to the obligatory MSc specific courses)?
- Is the level of the project challenging enough for a MSc IDE graduating student?
- Is the project expected to be doable within 100 working days/20 weeks ?
- Does the composition of the supervisory team comply with the regulations and fit the assignment ?

Content: APPROVED NOT APPROVED

Procedure: APPROVED NOT APPROVED

- the missing course ID4070 should be finished before the green light meeting

comments

name Monique von Morgen date 21/3/2023 signature MvM

Creating a Customer Experience Framework for Technology Consultants project title

Please state the title of your graduation project (above) and the start date and end date (below). Keep the title compact and simple. Do not use abbreviations. The remainder of this document allows you to define and clarify your graduation project.

start date 21 - 02 - 2023 11 - 07 - 2023 end date

INTRODUCTION **

Please describe, the context of your project, and address the main stakeholders (interests) within this context in a concise yet complete manner. Who are involved, what do they value and how do they currently operate within the given context? What are the main opportunities and limitations you are currently aware of (cultural- and social norms, resources (time, money,...), technology, ...).

Ernst & Young (EY) is a global company in assurance, consulting, strategy and transactions, and tax services. Consulting at EY realizes business transformation through the power of people, technology and innovation. Within EY the Netherlands are a set of consulting teams. The Technology Transformation (TT) team is part of FSO (Financial Services Organization) Consulting. This means that the TT team offers IT solutions for Dutch companies in the financial sector. These companies are bank, insurance companies, and wealth and asset management.

Consultants from the TT team get outsourced by these financial institutions. They typically advise clients on defining and implementing their IT strategies, business models, IT architecture, innovation programs or major technology deployments. Technology is at the top of their administrative agenda. Clients and customers expect more and more technological products and services. It, therefore, focuses on technology that provides data-driven solutions. By implementing a fundamental technological transformation, they make companies more ready to compete.

One of the biggest trends in private banking and other financial companies is designing and implementing customer centric solutions (McKinsey, 2020). Traditional financial companies are lagging behind the modern fin-tech companies that are disrupting the market. To be able to deliver next generation IT solution to financial companies, the TT team at EY should not only focus on IT infrastructure and strategies during their projects, but should also focus on the customer experience (CX) of the end-users (customers). Advising a better IT system is not enough any more to beat the competition. Companies in the financial sectors have to have extraordinary customer focused interfaces, experiences and journeys to keep up in this saturated market. It is an opportunity for the TT team to add this to their capabilities when working at one of their clients.

EY also has its own design agency, EY VODW. Here, UX designers create front-end solutions and advise their clients on customer excellence. The TT team can learn from the designers at VODW, but shouldn't replace their work.

This project involves the following stakeholders:

Main stakeholder: EY's Technology Transformation team (consultants, seniors and managers)
 Followed by their clients, Dutch financial institutions (banks, insurance companies, wealth and asset management)
 As well as the design consultancy firm within EY: VODW (business consultants and seniors)
 Since the project is done at EY the Netherlands, the project should align with the company's purpose 'Building a better working world'. This makes the company (in the Netherlands and globally) itself a stakeholder as well.

Main opportunity of this project would be adding value to the TT team. The team also has to acknowledge the importance of the design tools to be ahead of its competitors. This can result in them being able to deliver more exceptional and thorough work at their clients.

There are a few limitations to the project. Within EY's FSO consulting, there are multiple teams that work for clients in the financial sector. The project and its final deliverable will focus on and will be made for the TT team. The project and the final deliverable also only focusses on companies in the financial sector in the Netherlands. The framework aims to help the team with delivering better work when being outsourced by banks, insurance companies, pension funds and wealth and asset managers.

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Personal Project Brief - IDE Master Graduation

introduction (continued): space for images

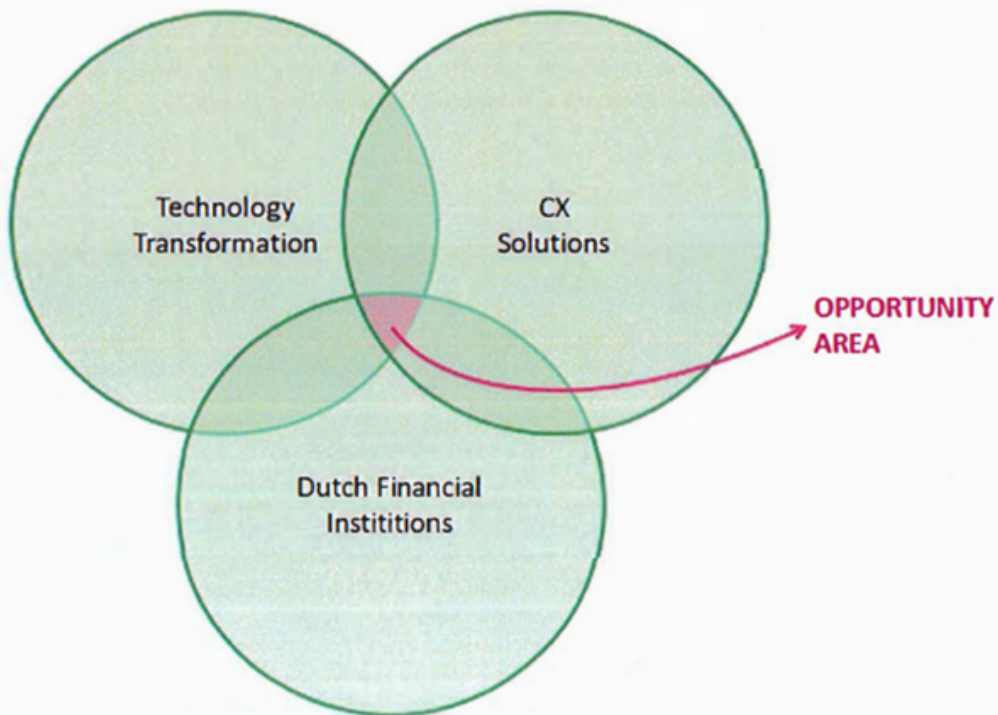


image / figure 1: Scoping the subject

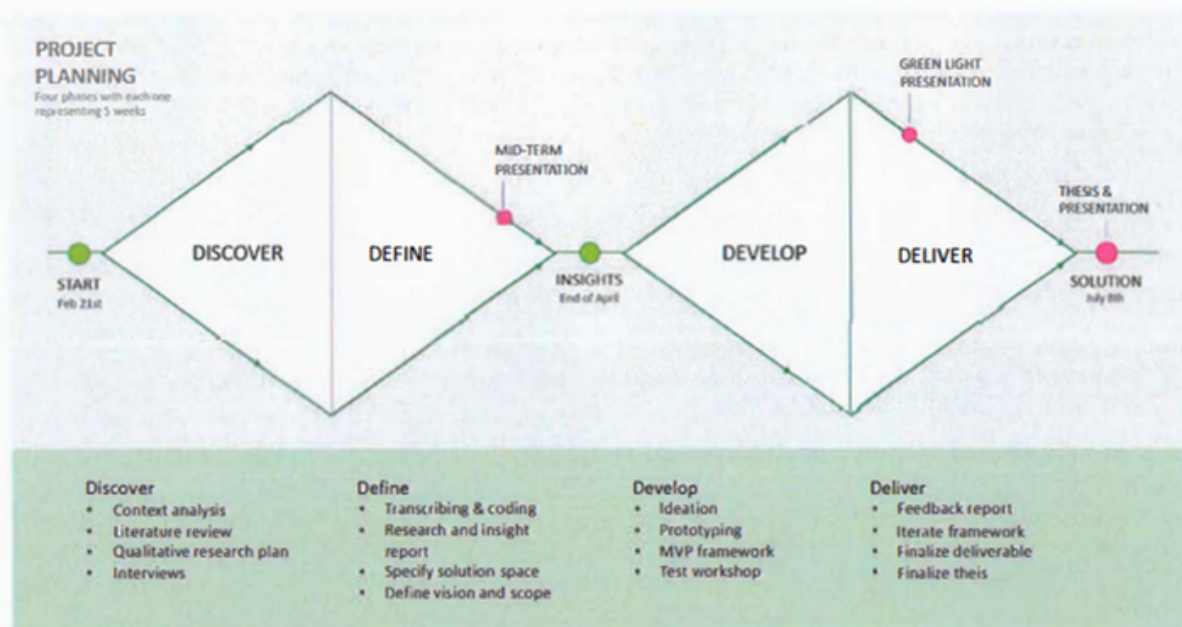


image / figure 2: Double diamond approach

PROBLEM DEFINITION **

Limit and define the scope and solution space of your project to one that is manageable within one Master Graduation Project of 30 EC (= 20 full time weeks or 100 working days) and clearly indicate what issue(s) should be addressed in this project.

The Technology Transformation (TT) team at EY provides its clients with setting up technology strategies and technological operating models. Nevertheless, the demand of EY's client is shifting. Advising the best IT solutions to its clients is not enough any more. The client and its customers are also asking for next level customer experiences (CX). When it comes to CX at the TT team, there is a lack of knowledge and no future vision, while CX is becoming increasingly more important.

As mentioned during a meeting with the team, the team wants to shift towards CX-related projects. A part of the problem is that the team doesn't have a clear future vision for long-term aspiration and future direction. The team is also unaware of the tools they can use while working on CX project at their client. During this research, their future vision will be created. This vision and the values of the team will be the base of the end deliverable, the CX framework. During this research, it will be also important to investigate the following: what are the team's capabilities are (when it comes to CX)? At what point is a CX designer needed?

Therefore, this research asks for a thorough understanding of the TT team, CX, what the future of financial institutions will look like when it comes to CX, and what is needed to achieve the team's goals. A CX framework made for the TT team will help them with delivering better solution when working at their clients. With this framework, the TT team will have a better understanding of which tools add value to their work and projects. Additionally, it will help with acquiring more clients since they will be able to deliver IT-solutions and add value to the customer experience.

ASSIGNMENT **

State in 2 or 3 sentences what you are going to research, design, create and / or generate, that will solve (part of) the issue(s) pointed out in "problem definition". Then illustrate this assignment by indicating what kind of solution you expect and / or aim to deliver, for instance: a product, a product-service combination, a strategy illustrated through product or product-service combination ideas, In case of a Specialisation and/or Annotation, make sure the assignment reflects this/these.

Create a CX framework for the Technology Transformation team. The CX framework helps them to deliver customer centric solutions to their clients in the financial sector.

I will investigate the future of financial companies, CX and frameworks. Besides this external analysis, I will also do internal research. I will research the TT team itself, what work they do, how they do it and what they deliver. At the same time, front-end designers from EY VOWD will be interviewed.

It will be important to find knowledge gaps, but also to identify the limits of the TT team. This means that they know what they can do themselves and when a experienced CX designer from VODW is needed.

Next to the internal and external research, it will be needed to formulate a vision, mission and goals for the team. This has to be decided together. In this way, the team collectively shares the same direction they want to go the coming years. By defining goals, the success of the CX framework can be measured.

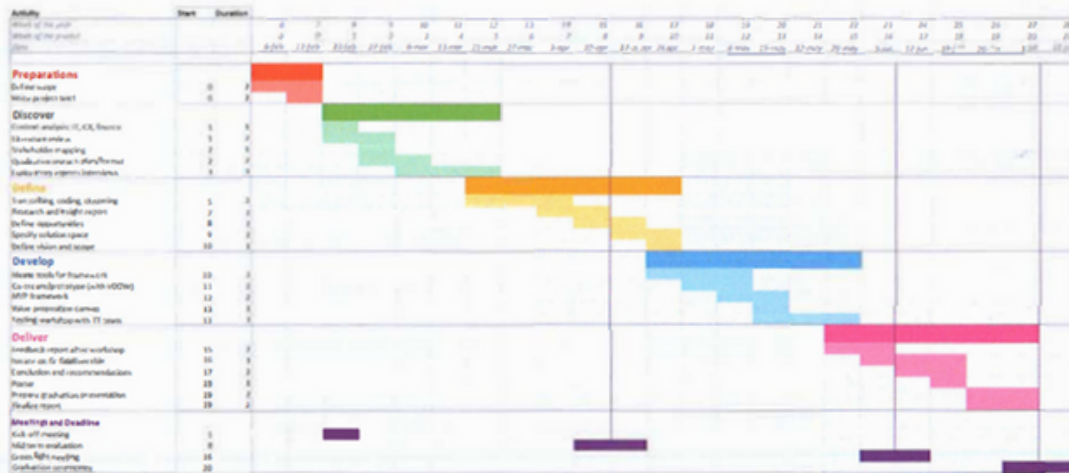
With the help of interviews, workshops and co-creation sessions it will be determined which tools are useful for the team. The co-creation sessions and workshops will also help the team with getting familiar with the tools they will use in future projects.

The main deliverable will be a framework based on expert interview insights and insights from the workshop and co-creation sessions.

PLANNING AND APPROACH **

Include a Gantt Chart (replace the example below - more examples can be found in Manual 2) that shows the different phases of your project, deliverables you have in mind, meetings, and how you plan to spend your time. Please note that all activities should fit within the given net time of 30 EC = 20 full time weeks or 100 working days, and your planning should include a kick-off meeting, mid-term meeting, green light meeting and graduation ceremony. Illustrate your Gantt Chart by, for instance, explaining your approach, and please indicate periods of part-time activities and/or periods of not spending time on your graduation project, if any, for instance because of holidays or parallel activities.

start date 21 - 2 - 2023 11 - 7 - 2023 end date



Discover (5 weeks): Explore context and set goal for literature review. Perform literature review. Get deeper understanding of CX, and what the TT team does and the challenges they face. Setting the goal for interviewing experts (within and outside of the TT team) and understand how the future of the financial sector will look like.

Define (5/6 weeks): The results of the interviews and literature review will be brought together and analysed. The insights from the interviewed experts are clustered and translated into a future vision and mission for the TT team. Opportunities for TT will be defined. This vision and mission are the base of the final solution.

Develop (5 weeks): The road to the CX framework is explored. By facilitating brainstorm/co-creation sessions, ideas for the framework are mapped/created. A first draft of the CX framework will be made.

Deliver (4/5 weeks): The conceptual framework will be validated by the TT team using workshops. With insights from the workshop and feedback forms, an iterations of the framework will be made. With the amended version of the conceptual framework, an implementation plan will be made. After the last iteration the CX framework is finalised.

Kick-off: February 21st 2023, Midterm: April 18th 2023, Green light: June 13th 2023, Graduation: July 11th 2023

I'm planning to work three days a week at the EY office and twice a week from home or TU Delft. I will have weekly meetings with either my supervisory team or my counsellor at EY.

MOTIVATION AND PERSONAL AMBITIONS

Explain why you set up this project, what competences you want to prove and learn. For example: acquired competences from your MSc programme, the elective semester, extra-curricular activities (etc.) and point out the competences you have yet developed. Optionally, describe which personal learning ambitions you explicitly want to address in this project, on top of the learning objectives of the Graduation Project, such as: in depth knowledge a on specific subject, broadening your competences or experimenting with a specific tool and/or methodology, Stick to no more than five ambitions.

After finishing my BSc Industrial Design Engineering, I was sure about one thing: I will not be a physical product designer in the future. Nevertheless, I knew there was space to explore where technology, business and design meet. That's why I started working at a fintech company Adyen. A B2B tech company which offers payment solutions to the world's biggest companies. It got me more interested in tech, service design and finance.

SPD was the obvious choice. Bachelor course SPI was my favourite one together with PO3. Analysing companies, coming up with a future vision and strategically decide how to get there gives me energy and excites me. Within SPD, I enjoyed DSP and BCP the most.

For my Graduation project I want to combine my SPD knowledge and the work experience gained at Adyen. At IDE, we mostly focus on consumer products or customer-facing products. Meanwhile, there is so much interesting stuff going on in the B2B financial world. Luckily, last year, EY was recruiting for thesis interns. This time for their Technology Transformation (TT) team who's clients are financial companies. It was a match and I got hired.

During my first two weeks, I was (subconsciously) analysing the TT team of EY. My initial idea was to come up with a new strategy or service for a bank. While diving into the team and their work, I saw a knowledge gap. Clients were asking for more customer experience/centric solutions, but things like 'customer journey' and 'personas' were unknown by the team. As the only designer (or person with design background) I realised how useful design tools could be in this situation.

For this project I have the following personal learning objectives:

- Project Management: all SPD's courses are in groups. It is going to be a challenge to manage this project all by myself. Mostly during projects I am more on the operating side than delegating side. I will have to plan the project well, know when to update my supervisor and when to ask for help, and make tough decisions.
- Documenting/academic writing: I write the way I talk, which is not every academic. "I can hear you talk" is what I hear often when someone reviews a piece I have written. Writing with a professional tone of voice will be important for the project. As well as knowing what goes into the report and what goes in the appendix is important. But mostly the documenting itself will be a challenging objective.
- Giving (co-creation) workshops: during my time at EY I want to host workshops as part of my graduation project, but also for personal development. Presenting can make me quite nervous. Facilitating a workshop with people with different backgrounds who are not familiar with design thinking tools will be even harder. Learning by doing will help me become better at this.

FINAL COMMENTS

In case your project brief needs final comments, please add any information you think is relevant.

CONSENT FORM

Informed consent form

To be filled in by research participants:

Yes

I consent voluntarily to be a participant in this research and understand that I can refuse to answer questions and can withdraw from the research at any time, without having to give a reason.

Use this information in the research

I understand that the information I provide will be used for a report about the conducted interview research, and will be fully anonymized unless permission is asked.

Signatures

Name of participant

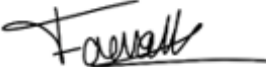
Signature

Date

To be filled in by the researcher:

I have accurately informed the potential participant of the research and, to the best of my ability, ensured that the participant understands what he/she is freely consenting.

Frédérique Valk
Name of researcher


Signature

08/03/23
Date

Contact details for further information:

Frédérique Valk

+31639049175

Frederique.valk@nl.ey.com

INTERVIEW PLAN

Checklist for start:s

- Consent form
- Ask for permission to audio-record
- Audio-record the interview

Introductory script:

Hi, thank you so much for helping me with my Master thesis. My name is Frédérique Valk and I study Strategic Product Design at TU Delft. For my Master thesis I will create a Customer Experience framework for the technology transformation team (at EY). I research the capabilities of the team, identify knowledge gaps, and create a future vision. There are no wrong answers in this interview. So, to start, can you tell me who you are and what to do at EY?

Part 1: About the team (TT, BT, DnA, DET, VODW)

- How would you describe what your team does when working at the client?
- How do you approach problem-solving and decision-making in your work, and what are some of the strategies you use to ensure that your solutions are effective and efficient?
- What technologies play an important part in your job now?
- What are some of the key skills and competencies that you believe are essential for the people in the team?
- What are your team's core capabilities when working at the client?

Part 2: At the client: The future of finance and technology

- What challenges you face when working at the client?
 - How do you overcome these challenges?
- How would you describe the current state of technology used at financial institutions?
- Considering the rise of new technologies -such as ChatGPT, AI, Robo-advisors, open banking- which future technologies do you think will play an important role in the future
- How do you think the future of financial institutions such as banks and insurances will look like in 10 years?

Part 3: How can customer experience be incorporated in the future of financial institutions. This part also includes how Customer Experience (CX) is incorporated at this moment, and if any tools are used now (specific for TT)

- What comes to mind when you think of CX?
- To what extent is CX incorporated in your team's work?
- How do you think CX is currently incorporated in financial institutions?
 - What challenges do you see for those companies?
- What are the pain points or challenges faced by clients?
 - And how can CX help address those challenges?

Follow-up questions:

-Why hasn't the team shifted more towards CX in the past?

Part 4a: The future of the team, its goals, mission and vision (specific for TT team)

- How does your dream project look like?
 - o And dream CX project?
- How do we want to be perceived by our clients?
 - o How will CX help create that perception?
- What are the long-term aspirations for the team
 - o And for our CX strategy?
- How will our CX strategy contribute to the broader goals of our clients, such as promoting financial wellness and literacy for consumers?
- What role will our employees play in our CX strategy?
 - o How will they be trained and empowered to deliver a high level of CX?

Part 4b: More about the team's work (specific for VODW)

- What are some of the most common challenges/pain points that your clients typically face?
 - o and how do you help them overcome these obstacles?
 - o How does CX help with that?
- Which CX tools are used often during projects?
- To what extent is technology incorporated in VODW's work?
 - o Think about AI, robo-advisors
- How well -in your opinion- is CX currently incorporated in your client's business?
 - o What challenges do you see for those companies?
- Which skills do you think will be important for your projects?
- How does your team measure success?

Checklist for closure:

- Thank the other person
- Anything you feel like you still want me to know about the topics we talked about in the interview?
- Share the results after the projects

SUMMARY DNA, BT, AND DET

DnA

Within Data & Analytics are different sub-teams. There are data engineers, data managers and data strategists. They focus analyzing data, research which data to use, and how the data can be used for the company's growth. Internally they research how data can be securely stored and how data can be deleted the right way. They research the challenges that come with data so they know better what to do when a client has a similar question.

Their clients are mostly companies in the financial sector such as banks and insurance companies. Sometimes they also do project for companies in other sectors such as the retail industry. With their solutions they help the company, and build products that affect the client's customers. They use their data analysis to create new opportunities for their client. They help them grow in a strategic way. A common tool they sue for programming is Python. Client who reach out to DnA mostly don't have in-house Python experts.

The skills within it DnA are both management skills and technical skills, depending on the sub-team. Communication skills are imporant for all sub-teams. The management side have facilitating, sales, presenting skills. Data managers have to be really good at PowerPoint to communicate the technical stuff and explain codes. The technical side work a lot with Pytho, Power Bi, and data visualisation. They can code, but also have to be able to explain them and what it can do.

Concerning CX, the team's project have an idirect realation with customer experience. They are not CX experts themselves, but their porjects at client are mostly about using data to enhance the CX. With data they find the best place to open a new store in a place that customers would want one. They translate data from banks to visualize to the bank's customers where there money goes. As in, with data they can determine which transaction is made in a supermarket or on plane tickets. So, CX is not the main goal, it is rather using data in a way that the client can make strategic choices with it.

DnA rarely collaborates with other team, and has never collaborated with VODW.

BT

Within Business Transformation they focus on business and operations. Helping clients with strategy implementations, customer related assignments and more optimization from a process perspective. And regulations also play a role in these types of projects. Their client are both within the financial secto and outside of the financial sector

They ensure that what they make is actually make it workable. They often have to make adjustments in your organization in the area of people. Technology processes governance are one of the thing they recently do. It's a combination of where everything comes together, and what are the important skills that those people in the business transformation team should have. There is not one profile wihtin BT, the interviewee would say, precisely because we want to have different backgrounds. What makes them different than others is that they are very experienced in change management, project management and stakeholder manager. This all comes together in their projects.

Concerning CX, the interviewee told that they had a training on design thinkig a week earlier. They try to combine business and customer as much as possible. They are more likely to focus on cusotmer growth than customer expeirence.

BT has not collaborated with VODW.

DET

Within Digital and Emerging Technology the consultants focus on new technologies and how that can support their clients. Their clients are in the financial sector. Now blockchain, AI and cloud are becoming more relevant for their clients. The consultants for example focus on restoration work which often takes place based on regulations, done for the government. They are the supporting factor in the area for new business processes.

Clients all indicate that they find these new technologies very interesting, but are not ready for it, partly because of a blockchain, for example. It does undermine the whole idea of a bank, but that makes it more interesting for the team. With their clients they do knowledge sessions about this kind of new technology or about how it all works out. With all these new technologies they focus a lot on the security of it as that is very important for them and the client.

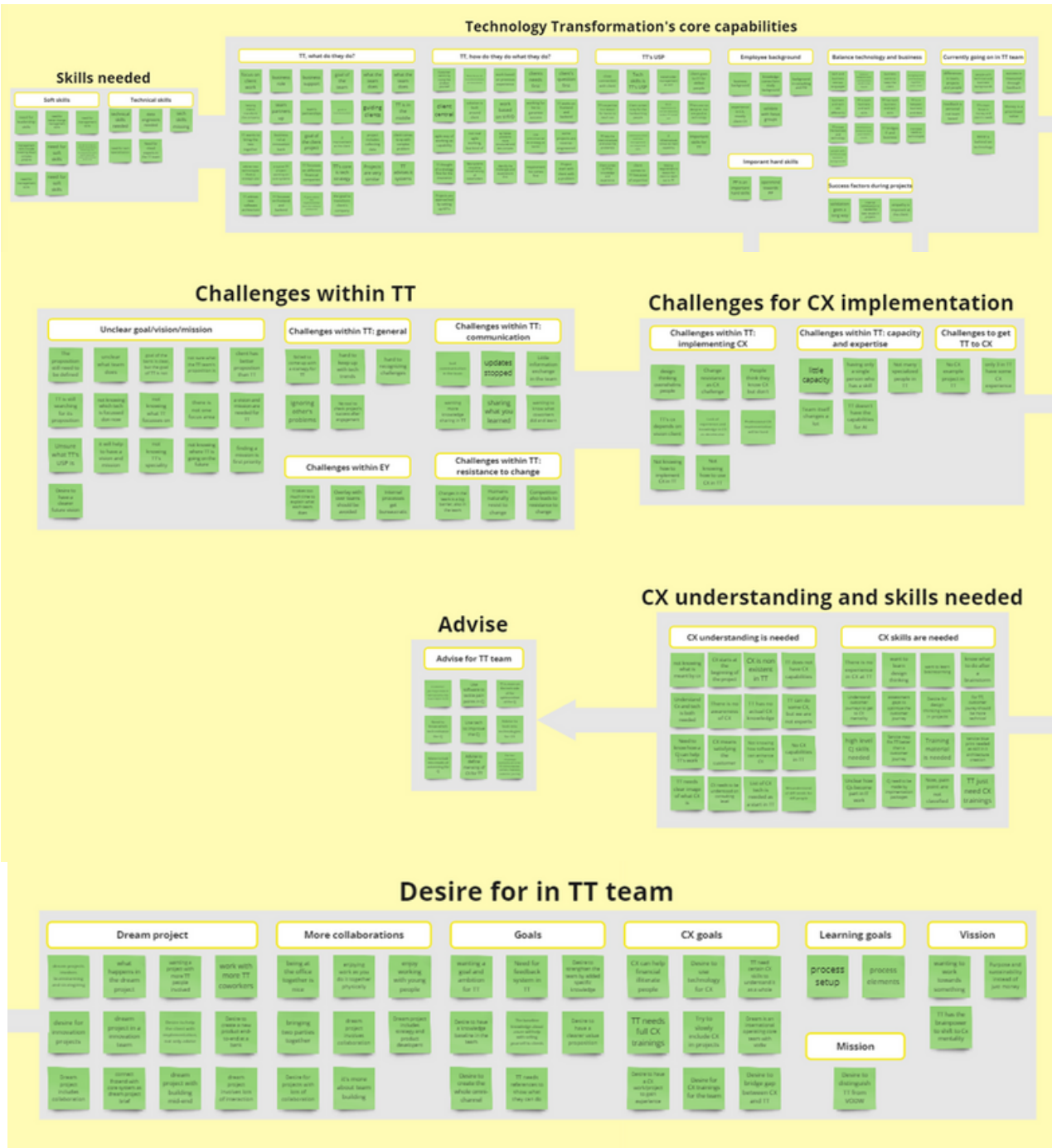
They get hired by clients when the clients miss manpower, or someone with advanced technical skills. But also, the idea of someone with a fresher look at it, since such organizations can be old and the people there are resistant to change.

When it comes to certain skills, design thinking and an agile way of working, an IT background is not a must, but they all do have an affinity with technology.

Concerning CX, the team has no experience with it, but DET has collaborated with VODW. During this collaboration project the interviewee noticed the different dynamic on how they step into a session is very different from what we do in financial consulting. Financial/technical consultant was described as more so-called 'boring' and VODW was more creative. That also brings challenges. Interviewee: "You have to imagine that designers are a bit more creative of course and are often a bit more free-spirited. From okay we can do it like this and. There are, so can you put the limit in terms of possibilities compared to my team, which is a lot more blue profiles with programming and techniques that say yes, that one is, I think very much in a box as it were and how that works together." What helped during this collaboration was to have a lot of meetings, but short one. In the morning, have a stand-up together, talk about today's tasks and continue. Decisions were made together and sometimes some people just had to compromise.

APPENDIX E

CODES IN CLUSTERS



APPENDIX F

CO-CREATION WITH SPD STUDENTS

Goal

1. Process inspiration: insights, statements
2. Come up with new ideas
3. Form the solution space

Participants

Strategic design students, who know EY

Introduction

How can TT adapt a more customer-centric approach and focus on the customer experience? And increase the desirability of their transformation projects?

Thesis Subject

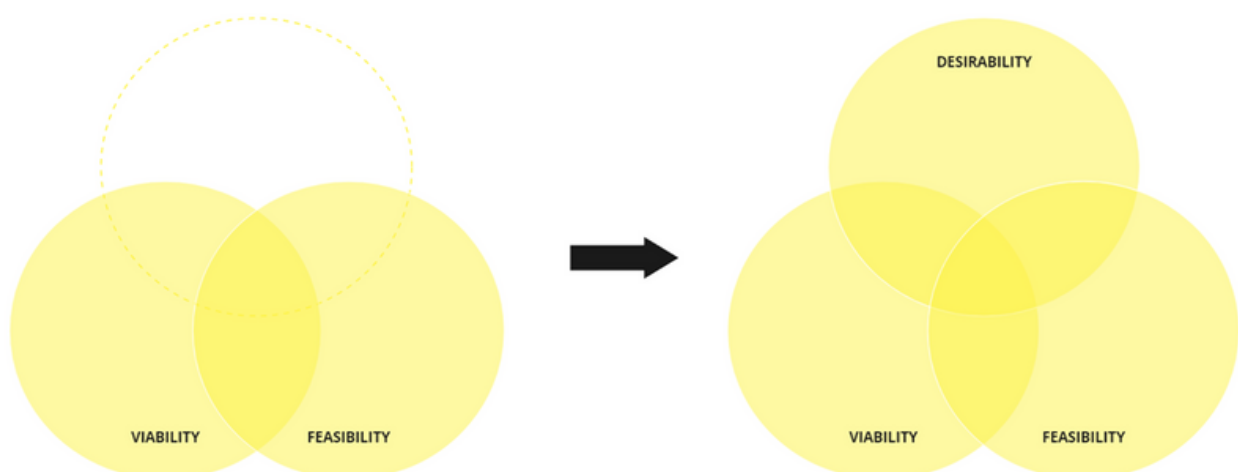
This creative session is for done for a technology consulting team from Ernst & Young (EY)

Technology Transformation (TT) is a team of IT consultants with a technology or business background. It is their job to advise IT systems, new technologies, and software providers. They see themselves as the bridge between technology and business.

Their clients, financial companies, come to TT for advice. The advice that EY gives must be technically executable (feasible) and good for the business (viable). Nevertheless, they forget to empathize with the customer (desirability). Here, 'the customer' is the client's customer, and the client's employees, such as customer support, IT and finance specialists.

EY has its own design consultancy, VODW. Those consultants are CX experts and work with a customer-centric approach. TT & VODW want to collaborate more often in the future, but they have different values and speak a different 'language'

Explaining Problem Definition



Goals of the thesis:

- Make EY focus on Customer Experience to increase desirability in projects
- Increase collaboration TT and VODW

Rolestorming

HKJ's: project context

Image... je bent een tech consultant en werkt aan een groot transformatieve project bij een verzekeraar (naam: AZ Goede Zorg). Het afsluiten van polissen en schade claims indienen gaat met name telefonisch bij deze verzekeraar. Echter, door o.a. personeel te kort gaat het bedrijf digitaliseren. Als tech consultant ben je verantwoordelijk voor deze digitale transformatie. De IT system die je gaat adviseren (en implementeren) moeten gebruiksvriendelijk voor klanten, klantenservice en specialisten van de verzekeraar.

HKJ de consument meer centraal zetten?

HKJ een product/service meer desirable maken?

Quiet Brainstorming

HKJ CX tools (design thinking) introduceren/leren aan (tech) consultants?

HKJ de samenwerking tussen TT en VODW bevorderen?

Extra

1. Can you think of ideas how to tackle these problems?
2. And how I can test/validate these ideas?

Goal of the creative session

1. Process inspiration: insights, statements

HKJ
de samenwerking tussen TT (technen) en VODW
(designers) bevorderen?
3 min.

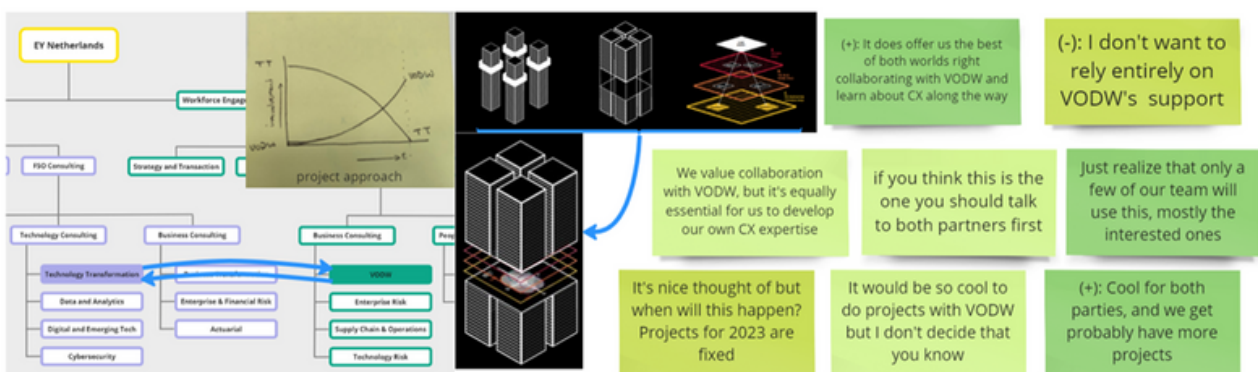
EY

APPENDIX G

CONCEPT DEVELOPMENT & HARRIS PROFILE

Concept one is a CX framework for TT, it would be a structured approach outlining the principles, strategies, and methodologies for implementing and delivering CX in CX projects. It focuses on customer-centricity, CX tools, and incorporating feedback tools. To make the framework more actionable, it will include case studies that show how CX has been applied to projects at EY teams in the US and UK.

The next concept is not mentioned in the report. Here, it is referred to as concept two. What is called concept two in the report is in this appendix referred to as concept three. Concept two (here) is a collaborative model/product designed to facilitate and enhance the partnership between TT and VODW in delivering CX solutions. This model would establish clear communication channels, streamlined processes, and effective collaboration mechanisms, allowing both teams to seamlessly work together on joint projects. It will involve shared tools and platforms, standardized practices, and regular knowledge exchange sessions to leverage each other's expertise and capabilities. The collaborative model would not only strengthen the collaboration between the two teams but also promote the development of CX capabilities for TT.



Concept three (number two in the report) is the CX playbook. It is a resource filled with CX tools and methodologies to develop TT's CX capabilities. It serves as a guide for the team members to understand, implement, and enhance customer-centric practices. These capabilities can then later be used in their projects and engagements. The playbook offers a structured approach to CX, teaching TT team members the CX capabilities they need.

Concept 1: CX Framework

USE: EXTERNALLY, AT THE CLIENT

GOAL: USE CX SKILLS DIRECTLY AT THE CLIENT

INTENTION: FRAMEWORK GUIDES THEM THROUGH TRANSFORMATION PROJECTS

CX FOR TT: TT GETS CX TRAINING

FOCUS: MADE FOR PROJECTS AT INSURANCES

DELIVERABLE: FRAMEWORK AND GUIDE WHICH INCLUDES CUSTOMER EXPERIENCE TOOLS AND TEMPLATES

PROS:

- Most practical and direct solution for the team, since there are a lot of transformation projects at insurances lately
- TT will learn everything themselves, and won't need VODW (= more money for TT)

CONS:

- Every project is unique and focuses on different parts of the transformation, making a one-fits-all framework very hard
- I have no experience and knowledge about the exact content of these transformation projects, will be hard to achieve in the given time frame

Concept 2: Collaboration Model

USE: INTERNALLY

GOAL: EASY COLLABORATION VODW & TT

INTENTION: MODEL BOOSTS COLLABORATION FOR TEAMS WITH DIFFERENT VALUES, LANGUAGE, INTEREST, EXPERTISE

FOCUS: MANAGEMENT OF TWO TEAMS

CX FOR TT: TT DOES NOT WORK ON CX SKILLS

DELIVERABLE: MODEL & ROADMAP TO ACHIEVE SUCCESSFUL COLLABORATING PROJECTS IN THE FUTURE

PROS:

- Experts (from both TT & VODW) can focus on their expertise without putting time and effort in a new phenomenon
- The model can be used throughout the company (mostly EY Tech) for teams who want to collaborate

CONS:

- TT will still depend on VODW for everything CX related
- Even after boosting collaboration does it depend on partners and if they want to acquire projects together

Concept 3: CX Playbook

USE: INTERNALLY

GOAL: CREATE CX KNOWLEDGE AND ADD CX SKILLS

INTENTION: MAKE THE FIRST STEP TOWARDS A END-TO-END SOLUTION BUILDING TEAM

FOCUS: CREATE 'CX AWARENESS' AND FOSTER CUSTOMER-CENTRIC APPROACH

CX FOR TT: LEARN BASIC UNDERSTANDING, DESIGN PRINCIPLES, TOOLS AND METHODS

DELIVERABLE: A BOOK WHICH INTRODUCES CX, ITS TOOLS, METHODS, INCLUDES SUCCESS STORIES FROM EY US/UK/AUS

PROS:

- Book starts at the core of the problem which can build a strong foundation for the future
- Accessible for all levels and can be part of the onboarding process for new consultants within TT

CONS:

- As it focusses on the consultants first, the client and the projects come second and thus will not instantly benefit from the book
- Collaborating with VODW will still be needed as the team's knowledge about CX is minimal

- Requirements:**
- 1) Increases TT's knowledge on CX
 - 2) Increases collaboration with VODW
 - 3) Accessible to consultants with varying levels of experience
 - 4) User-friendly and easy to navigate
 - 5) Time of implementation
 - 6) Applicability at the client
 - 7) Feasible in the given time
 - 8) Scalable to accommodate future growth of the team and its projects

	1			2			3					
	--	-	+	++	--	-	+	++	--	-	+	++
1) Increases TT's knowledge on CX				X	X							X
2) Increases collaboration with VODW		X						X		X		
3) Accessible to consultants with varying levels of experience			X					X				X
4) User-friendly and easy to navigate			X			X						X
5) Time of implementation		X				X				X		
6) Applicability at the client				X		X				X		
7) Feasible in the given time		X										X
8) Scalable to accommodate future growth of the team and its projects			X				X				X	

Framework (7-3=4)

Collab (8-4=4)

Playbook (9-3=6)

APPENDIX H

CO-CREATION WITH VODW CONSULTANTS

Goal

1. Develop concept
2. Frame collaboration strategy
3. Make validation/test plan

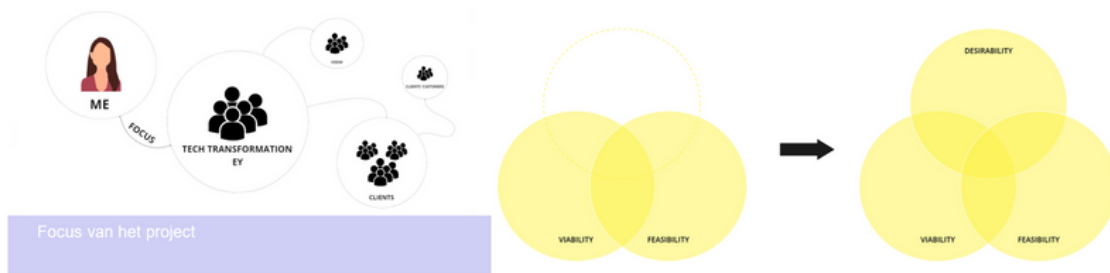
Participants

Three design consultants from VODW, with over a year of work experience in the team

Research Question

How can TT adapt a more customer-centric approach and focus on the customer experience?
And increase the desirability of their transformation projects?

Explaining the Focus & Problem Definition



Introducing the three concepts

Three concept cards are displayed:

- Concept 1: CXFramework**: USE INTERNALLY AT THE CLIENT. IDEAL USED TO VALIDATE CHECK AT THE CLIENT. INTERVIEW TRANSFORMATION CLIENTS THEM THROUGH TRANSFORMATION PROJECTS OF ASSESS THE STATE OF TRANSFORMATION FROM USER. FOCUS FRAME FOR PROJECTS AT REFINANCE. DELIVERABLES: TRANSFORMATION AND GUIDE PROJECTS FOR CUSTOMERS. DEPENDENCY: COLLABORATION FRAMEWORK.
- Concept 2: Collaboration Model**: USE INTERNALLY WITHIN BY. IDEAL: EARLY COLLABORATION WITHIN & BY. INTERVIEW MODEL: BOOSTS COLLABORATION WITHIN TEAM WITH DIFFERENT VALUES, LANGUAGE, ROLES, SKILLS. FOCUS: MANAGEMENT OF TWO TEAMS. GIVE FOR FTIT DOES NOT WORK ON CX STRAIL. DELIVERABLES: A ROADMAP TO ACHIEVE SUCCESSFUL COLLABORATING PROJECTS IN THE FUTURE.
- Concept 3: CXPlaybook**: USE INTERNALLY WITHIN TT. IDEAL: CREATE CX KNOWLEDGE AND ASSESS TO BRILLES. INTERVIEW MAKE THE FIRST STEP THROUGH A BROAD-SCOPE SOLUTION BUILDING TEAM. FOCUS: CREATE CX KNOWLEDGE AND FOSTER CUSTOMER-CENTRIC APPROACH OF FOR FTIT/INBASIC. DELIVERABLES: DESIGN PRINCIPLES, TOOLS AND METHODS. DELIVERABLES BOOK WHICH INTRODUCED CX TO ITS TOOLS, METHODS INCLUDE SUCCESS STORIES FROM TT/STAKEHOLDERS.

Introducing the final, mixed concept

Requirements:

- Increases TT's knowledge on CX
- Increases collaboration with VODW
- Accessible to consultants with varying levels of experience
- User-friendly and easy to navigate
 - Time of implementation
 - Applicability at the client
 - Feasible in the given time
- Scalable to accommodate future growth of the team and its projects

	1	2	3
Requirements	X	X	X
Frame (73+4)	X		
Collab (84+4)		X	
Playbook (10+4)			X

The Customer Experience Strategy
for Manual or Handover of Tool/Software/Tools or Re-use of IT/Consultants/Project

0. Overview
1. Introduction of Customer Experience
2. Fundamentals of Customer Experience
3. Assessing Customer Experience
4. Improving Customer Experience
5. EY Case Studies and Examples
6. Resources and Tools
7. Glossary

Harris profile

1

The Customer Experience Strategy (or Manual or Handbook or Toolbox or Playbook)

0 Overview
Gives an overview of the book's structure and contents

1. Introduction of Customer Experience:
Introduces Customer Experience
Presents its importance in today's financial landscape
[Example of successful and unsuccessful companies]
Describes the impact of CX on business performance and customer retention.
[Include articles about customers leaving after bad customer experience]
Explains the role of TT consultants in enhancing CX
[How can TT help these companies? What can they add?]
Introduce VODW
[What they do, how they can help]

2. Fundamentals of Customer Experience:
Explains the key concepts, (design) principles, and tools of CX
Discusses user personas, customer journey mapping, and service blueprints
[Include tools, why and when to use it, how can it help]

3. Assessing Customer Experience:
Provide frameworks and methodologies for evaluating CX
Explains various research techniques, such as surveys, interviews, and data analysis
Offers guidance on analyzing customer feedback and identifying pain points
[Include frameworks & methods used by VODW/aren and how it can be implemented in TT's work]

4. Improving Customer Experience:
Explores different tactics and best practices for enhancing CX
Presents the role of technology in supporting CX initiatives
Covers topics like personalization, omni-channel experiences, and CRM systems
[Zoom in on the technology side of CX, tech trends, what to advise clients and when]

5. EY Case Studies and Examples:
Includes success stories that demonstrate successful transformations other EY offices
Provides list of learned lessons and strategies used in those projects
[Examples: Aegon, Allianz, NIK, HSBC, Barclay card, Bank of Ireland]

6. Resources and Tools:
A list of recommended books, articles, and online resources related to CX
Include templates, worksheets, or checklists that consultants can use during projects

7. Glossary of Terms:
Compiles a glossary of key CX-related terms and concepts supported by VODW to ensure a common understanding.

- In every chapter: "VODW's tips"
- Wanneer pakt men het boek erbij?
- Wie is de gebruiker? wat voor TT'er is het?
- Welke niveaus zijn er?
- Maak een assenstelsel voor implementaties
- Zorg dat er een rode draad is
- Define 3 personas
- bijv adhv het NN project
- Wanneer gebruiken ze het?
- Wat is je visie? en hoe ga je daar komen?
- Maak een customer journey, hoe gebruikt it dit boek?

rebrand het playbook

2



Friction between VODW and EY Tech.
VODW still needs to convince EY Tech of their skills

- Being unaware of each other's capabilities and work
- Having different values
- Speaking a different language

Collaboration teams depends on partners and managers

- Chances are being missed because of these policies and bureaucratic obstacles
- There is a battle about who owns the project and earns the money

So...

- How does VODW want to be presented to TT?
- When should TT reach out to TT?
- Which success story/case study shows what VODW can do for TT?

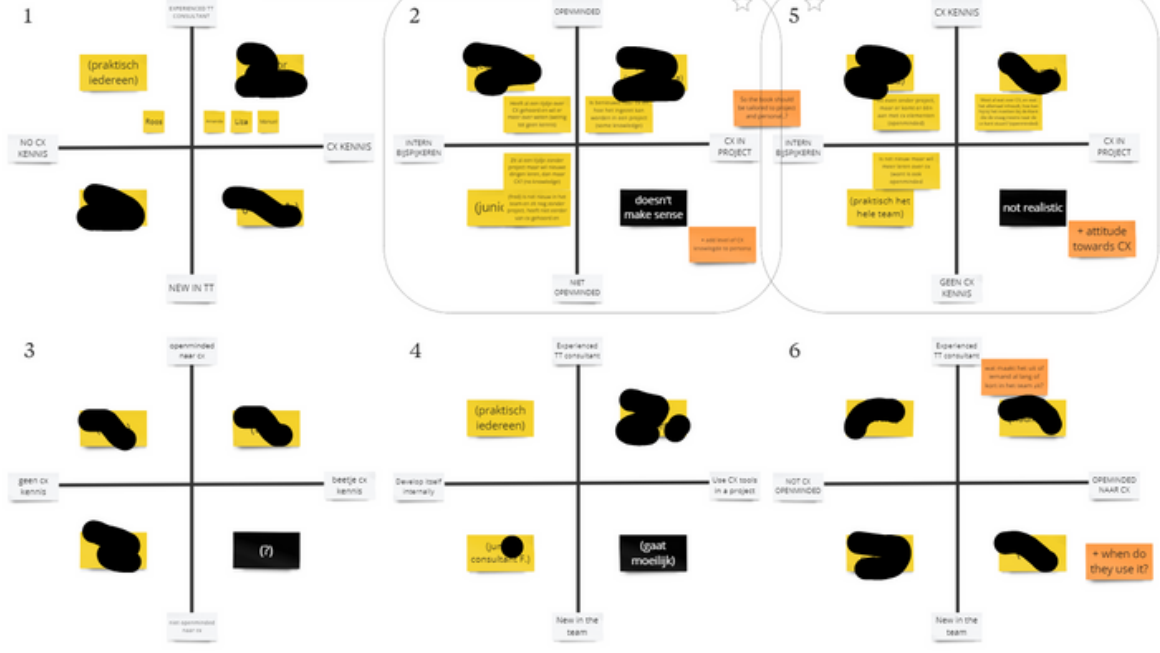
- we are not just designer
- zij zetten de eerste stap
- wij helpen daarna wel
- ik binnen VODW heb ik alle met financiële beslissingen gemaakt
- ze moesten gewoon hun ego opzij zetten
- ze mogen altijd ons kantoor binnenlopen
- wat zou vovd doen
- big aka toolstool voor hoe VODW haar kan helpen
- korte uitleg van het team
- we moeten elkaar opweken tijdens de vrijdag borrel
- "lemon-cheesecake" project
- grote bank project
- belasting project
- zie ey discovery voor interne verslagen

3




- en wanneer komt VODW naar TT?
- Roadmap fase 1
- samenwerkings strategie
- problem canvas: zorg dat het boek dat een logische oplossing is
- waar draagt het boek aan bij
- De EY visie is dat alles aan te pakken is
- Een super smooth samenwerking

Wie is de gebruiker



APPENDIX I

PERSONAS



Audrey

Role in TT
Consultant

Quote
"I'd love to focus more on the frontend of the IT systems we advise and implement"

Background
Has learned about customer experience during her study. She knows what a persona and customer journey are but has never worked with it during her time at EY.

Goals

- Get Scrum Master certificate
- Do an international project
- Use CX knowledge in transformation project

Challenges

- Understanding how CX can be implemented in her current projects
- Convincing colleagues to explore CX
- Convincing current client to consider CX


Personality

- Open-minded
- Team player
- Creative

Needs

- Fixed VODW consultant to reach out to when needed
- Actionable CX tools
- Trainings about service blueprint mapping

General persona



NAME: Audrey

QUOTE: *"I'd love to focus more on the human side of the IT systems we advise and implement"*

DESCRIPTION:
Openminded towards CX, incorporate CX in transformation project
(she has been a consultant at TT for over a year now, heard of CX during studies, but forgot some of it. He/she is working on a big and complex client project. Before reaching out to VODW he/she reaches for the CX book)

ROLE in TT
Junior Consultant

OBJECTIVES
She wants to refresh her knowledge on CX and use CX tool for her current project at an insurance company. Here she is responsible for the tech transformation of this company together with a few other colleagues

CHALLENGES
She does not know where to start. She is not sure which CX tools she should use now and is she is doing it the right way. Actually she needs some guidance from VODW

BACKGROUND
Has read about or heard about customer experience during her study. She knows what a persona and customer journey are but has never worked with it during her time at EY.

TRAITS
Audrey is openminded towards CX. She likes working in teams and challenging her colleagues to think outside of the box


NEEDS AND EXPECTATIONS
Audrey needs accessible tools and templates for her current project. She is eager to use and try them herself and show the results to her team when she is done. She hopes to get some help from VODW when something is unclear or needs an expert's eye.

KEY ACTIONS
Before: searches for CX tools that fit her needs and her project. Between the CX Files in Teams she finds the Guide

During: make use of the information and tools provided across the different channels. She reaches out to one of VODW's consultants to check whether she

After: Share finding with the team. Brings the Guide with her to show why what and how she has done it

Persona in the context of the CX Guide



James

Role in TT
Senior Consultant

Quote
"I want to work on my capabilities as much as possible so I can become the best in my team"

Background
Has a background in business economics. He hasn't worked with CX before. He did hear about the term a few times at the office.

Goals

- Get promoted to manager
- Become an expert on Azure
- Create a new product end-to-end at a bank

Challenges

- Distinguish himself from the rest
- Keeping up with trends and developments in the financial sector
- Gaining the right skills for end-to-end solutions

Personality

- Disciplined
- Social
- Confident

Needs

- Understand relevance of CX in today's financial sector
- Understand VODW's way of working, and what they can do for TT

General persona



NAME: James

QUOTE: "I want to work on my capabilities as much as possible so I can become the best in my team"

DESCRIPTION:
Openminded towards CX, acquire CX skills internally
(Experienced TT consultant who is eager to learn more skills and is curious about CX. Since he is in between project and knows a big transformation project is coming up, he has time to work on CX skills and reaches for the book)

ROLE in TT
Senior consultants

BACKGROUND
Has a background in business . Hasn't worked with CX before. He did hear about the term a few times at the office.

OBJECTIVES
He is in between big projects and is looking of new thing to learn and skills to develop. CX is not the first thing that comes to mind, but since it's becoming a more prominent term in the team he wants to explore the concept and see what he can learn about it and why it matters in today's business

TRAITS
Cedric is your typical driven consultant. Always curious about the newest things in technology and business. He wants to be the best in everything he does and he hates being behind. Is is openminded towards CX (or every new concept) and is eager to gain CX skills

KEY ACTIONS
Before: searches for new trends in market, new skills to learn and gain, and is curious about CX since it's been an often mentioned concept in the team


During: reads the book to get an understanding of CX in today's business and financial sector. He finds new information about VODW and success story from EY UK and US.

CHALLENGES
Cedric ha to be engaged from the first page. It should be clear what the added value of the Guide is for him. The Guide should be a comprehensive guide about CX but also explained in such a way that he understands it with his zero knowledge about CX

NEEDS AND EXPECTATIONS
It should be clear what CX means for him and TT, and why he should be paying more attention to it now and in the future. VODW's WoW should be explained in a way that Cedric doesn't think of them as just designers, and that VODW can help him with his work

After: Shares his findings with colleagues and uses the insights from the book in his upcoming project.

Persona in the context of the CX Guide



Oliver

Role in TT
Consultant

Quote
"I'm here to work on big project with banks and asset managers."

Background
Newly graduated. He has a major in business administration and has never heard of CX before.

Goals

- Start his first client project
- Desire to create the whole omni-channel of an asset management

Challenges

- Find his place within the team
- Get to know and befriend his colleagues
- Transition from student to consultant


Personality

- Persistent
- Curious
- Practical

Needs

- Onboarding consultant trainings
- Understand TT's way of working
- Understand current development in financial sector

General persona



NAME: Oliver

QUOTE: *"I'm here to work on big project with banks and asset managers."*

DESCRIPTION:
Not openminded towards CX, acquire CX skills internally
{New joiner who just started in TT, freshly graduated and has never heard of CX. He is not on a project yet, but is looking for something to do and a way to improve his skills. Advised by his counsel/buddy he tries out the CX guide}

ROLE in TT
Junior consultant

BACKGROUND
Has a major in business administration . He has never heard of CX before.

OBJECTIVES
Oliver is a new joiner in the team. He just graduated and this is his first real job. He is not on a project yet since he has to go through the onboarding process first. CX is not something he things about and want to think about at this job, it's technology consulting of course.

CHALLENGES
Oliver is not that openminded towards CX. It will be challenging to make the guide is such a way that he also engages with it comprehensive guide about CX but also explained in such a way that he understands it with his zero knowledge about CX

TRAITS
He is full of energy and is highly motivated. He is a hard worker, but not the biggest team player. There are a lot of things he has to learn and he has to grow a lot professionally but he is eager to do so.

NEEDS AND EXPECTATIONS
Oliver's expectations are low, but it is needed that the Guide speaks his language. More business and technology, than design. To keep Oliver engaged, the guide has to include market trends and interesting numbers that show the value of CX

KEY ACTIONS
Before: goes through the mandatory learnings and trainings as part of his onboarding. Advised by his counsel he gives the Guide a chance

During: reads the book to get an understanding of CX in today's business and financial sector. He finds new information about VODW and success story from EY UK and US.

After: Shares his findings with colleagues and future new starters. he now gets why the concept is becoming more popular in the team and sees the added values of CX for businesses.

Persona in the context of the CX Guide

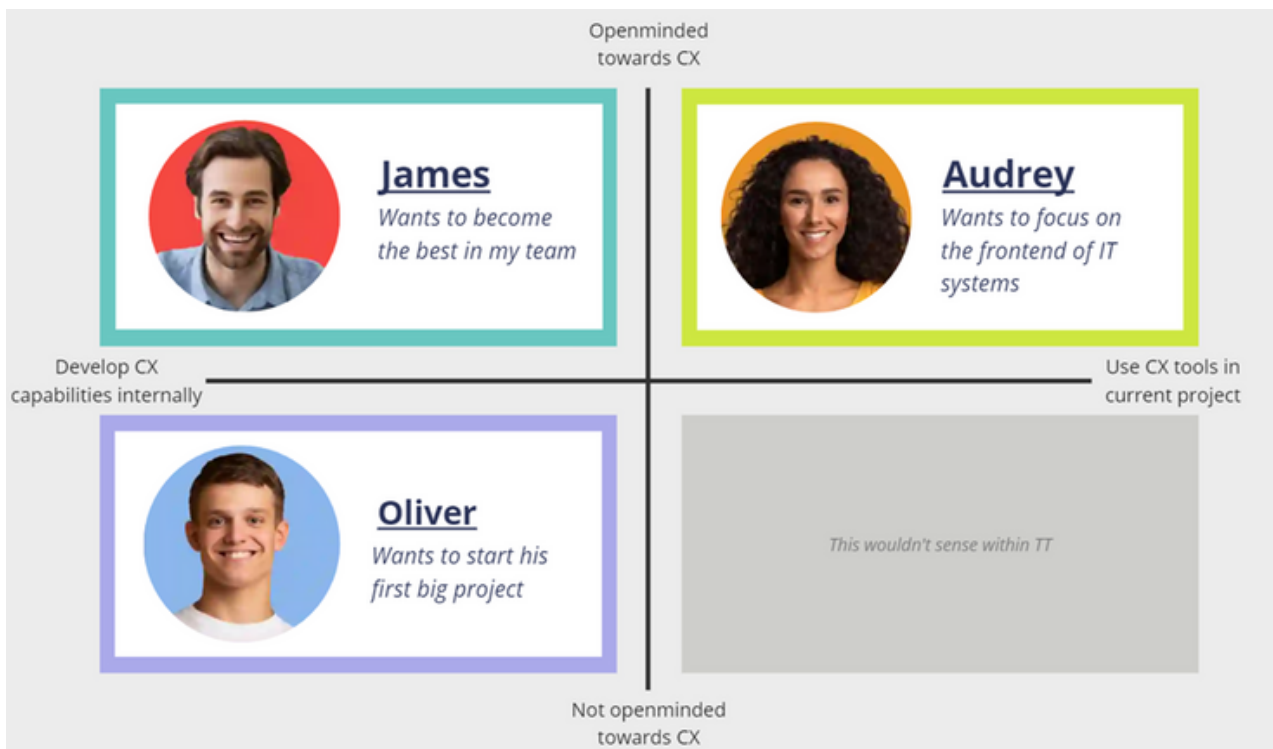
CONCEPT DEVELOPMENT WITH USER STORIES

The CX Guide is designed for a specific target audience: the TT team. To make a Guide tailored to their needs and wants, the personas are used to make user stories. The goal is to find new opportunities for further development of the CX Guide.

The CX Guide is used by the TT team, but it is important to mention that not every team member is the same. With 28 team members, the attitude towards CX and the amount of knowledge about CX differs. Three fictitious consultants will explore the CX Guide in this subchapter, discovering the different ways of using the CX Guide. The CX Guide is developed by imagining its use through the eyes of the three personas.

As the intended users of the CX Guide are TT consultants, it is vital to recognize and accommodate their unique differences. Insights gathered from interviews and working closely with the team over the last few months revealed varying attitudes toward CX among consultants. While some are highly motivated and eager to learn more about CX, others exhibit less interest and are focused on alternative professional pursuits. Given that the concept aims to cater to the entire TT team, not solely the CX enthusiasts, it is imperative to consider the diverse range of attitudes towards CX during the development of the CX Guide.

In Chapter 4.6, three personas were introduced to provide a better understanding of the technology consultants within TT. These personas were further analyzed during a creative session with VODW in Chapter 6.4, where they were placed on an axis to categorize their attitudes towards CX (Figure 26). On one axis, their openness toward CX was measured, with Audrey and James displaying receptiveness to CX concepts, while Oliver showed a lack of openness. On the other axis, the personas were categorized based on their willingness to utilize the tools from the CX Guide in different ways. Audrey expressed a readiness to apply the tools directly to her current project. On the other hand, James and Oliver are more likely to use the CX Guide internally to get familiar with CX first and apply the tools in future projects.



Audrey has been a consultant at TT for over a year now. She has heard of CX during her studies, but not at EY. She is currently working on a big transformation project at an insurance company. At this point of the project, Audrey wants to identify the pain point of the insurance's customer support specialists. Interviews have been conducted. Before reaching out to VODW she wants to make the personas and customer journeys herself. Most likely to use parts 5, 6, and 7 of the CX Guide first

James is an experienced technology consultant who has been at EY for almost 3 years now. He is currently in between projects. He has heard about CX before from colleagues but doesn't understand how this can be translated into a project within TT. With a big transformation project coming up and his goal to get promoted to manager, he is eager to expand his capabilities and learn something new. Mostly likely to use parts 2, 3, and 4 of the CX Guide first

Oliver is freshly graduated and is a new joiner in the TT team. He is excited that he has finally started his first real job, but he is not on a project yet. Oliver has never heard of CX before and has no interest in it since he doesn't see the added value of CX for himself and for the team. Mostly likely to use parts 1, 2, and 3 of the CX Guide first

Looking at the concept from a different point of view and exploring the different reasons and moments a consultant would reach out for the CX Guide led to finding further development of the CX Guide. The CX Guide should be accessible for consultants who have never heard of CX, but also for consultants who want to use the information from the Guide for their current project. Next, three individual user stories are created (Figure 27). The comprehensive versions of the personas can be found in Appendix I. A closer look at the user stories below.

By making these three user stories new needs, pains, touchpoints, and so new opportunities were found. Each user story includes four stages: Awareness/Knowledge, Consideration & Conversion, Service Experience & Retention, and Migration. From the user stories 20 opportunities (Figure below) emerged. These opportunities served as insights that were used to iterate and build upon the existing Guide with additional chapters and segments.

	Awareness/Knowledge	Consideration & Conversion	Service Experience & Retention	Migration
OPPORTUNITIES FOR THE GUIDE	1. Increase visibility of the CX Guide during projects.	4. Increase amount of touchpoints : both a digital version, as well as a physical version. 5. Create an easy and fast way to navigate to the CX tools.	9. Provide a Miro board including the tools with explanation, examples and template. 10. Includes help, tips and tricks from VODW . 11. Add list of systems that provide CX solutions that can help TT in this project.	17. Add digital version to the Teams file used during projects. 18. Make one person of TT responsible for (maintaining) the CX Guide.
	2. Increase visibility of the CX Guide outside of projects.	6. Easy navigation: from a first glance it should be clear what it covers. 7. Add numbers and facts that appeal to TT and are related to their work.	12. Add current CX technology trends . 13. Add comprehensive example from another EY office (UK/US) to illustrate what CX means for technology consultants. 14. Show how VODW solves their client's problems.	19. Add resources for further exploring what CX means for the different sort of financial institutions.
	3. Make CX Guide part of the onboarding starter kit .	8. CX Guide should strike a balance between looking aesthetic and serious, made for tech consultants.	15. Find CX-related disruptive technologies in financial sector to add to the relevance of CX. 16. Include case study from VODW which illustrates the teams work.	20. Add the possibility of getting certifications when attending a CX training by VODW.

Awareness/Knowledge

In the Awareness/Knowledge stage of the journey, a challenging insight emerged. Besides the content and usability, the accessibility of the CX Guide should be improved. This resulted in adding to the SharePoint of TT and to the MS Teams Files. With the digital version, consultants have access to the guide everywhere and at any time. Whether they are working at the office, at the client or from home. Another way to increase the visibility of the CX Guide is by making a physical copy or making it one of the mandatory materials that are part of the onboarding process for new joiners.

Consideration & Conversion

In the Consideration & Conversion stage, the same opportunity of adding touchpoints was discovered. Also, more results from CX research showing the impact of CX on businesses were added to the CX Guide, making it more appealing to its target audience. The Parts with the trends, tools, and templates, which are considered to be used to most, are added at the top of every screen to make it stand out and easy to find.

Service Experience & Retention






In the Service Experience & Retention stage, the idea of including a link to a Miro board with the CX tools for the CX Guide emerged. By including a Miro board it will be easier to collaborate with colleagues and re-use templates. Here, the addition of possible CX solutions and products emerged to make the CX Guide more interesting to consultants who all share a sense of curiosity for the new subject. Also, to strengthen the alliance with VODW, tips for them were included, together with a recent case study where they did a project at a Dutch insurance company. Finally, this phase resulted in the addition of Part 6, where a previous transformation project from EY UK is explained which includes personas, customer journeys, and a service blueprint.

Migration

In the Migration stage, it was discovered that the CX Guide should be adaptable for future updates. Mostly Chapter 3: CX Market Research. The chapter includes CX trends and technical developments. To keep up to date with these trends and developments, the team should have one person who is responsible for maintaining the CX Guide. That is in this case one particular manager from TT, she is also the only person on the team who has experience working with CX. She is eager to make the shift towards a team that can provide end-to-end solutions. Lastly, the addition of certificates. Consultants are encouraged to follow various trainings within EY. When they do this, they receive a certificate and they can add this to their portfolio. Getting certifications makes a consultant stand out when a new client project gets acquired by the partner who then will decide which consultant gets chosen to work on this project. This rewarding system will motivate consultants to develop their CX capabilities.

Journey Steps	Awareness/Knowledge	Consideration & Conversion	Service Experience & Retention	Migration	
Actions	<ul style="list-style-type: none"> Is working on a large insurance transformation project Is looking for documents on CX Becomes aware via colleagues 	<ul style="list-style-type: none"> Considers to read the CX Guide for her current project Chooses to read the CX Guide for her current project Avoids not reading the CX Guide for her current project 	<ul style="list-style-type: none"> Finds out about the CX Guide for her current project Reaches out to VOOV to ask about CX within insurance project Brings the CX Guide to the meeting to share the new findings 	<ul style="list-style-type: none"> Simulations follow to create a guide for the project and the next one 	
Needs and Pains	<ul style="list-style-type: none"> Achieve: Visible, easy to find documents Avoid: Spending hours on finding the right information Avoid: Overload of documents about CX in CX's global database 	<ul style="list-style-type: none"> Achieve: Information to look for next time Avoid: Not finding the needed information quickly 	<ul style="list-style-type: none"> Knows when to reach out to VOOV Knows when to reach out to VOOV Knows when to reach out to VOOV Knows when to reach out to VOOV 	<ul style="list-style-type: none"> Needs a clear approach and template to help her Needs a list of links and links to help her Needs a list of links and links to help her Needs a list of links and links to help her 	
Touchpoint	<ul style="list-style-type: none"> EY Discover digital guide Physical Guide digital guide 	<ul style="list-style-type: none"> Physical Guide digital guide 	<ul style="list-style-type: none"> digital guide Miro template board 	<ul style="list-style-type: none"> Physical Guide Miro template board 	
Customer Feeling	<ul style="list-style-type: none"> 😊 😐 😐 😐 	<ul style="list-style-type: none"> 😐 	<ul style="list-style-type: none"> 😐 	<ul style="list-style-type: none"> 😐 	<ul style="list-style-type: none"> 😐
Backstage					
Opportunities	<ul style="list-style-type: none"> Increase visibility of the CX Guide during projects 	<ul style="list-style-type: none"> Increase amount of touchpoints: PDF file, additional PP files, physical version, + easy way to navigate through Guide 	<ul style="list-style-type: none"> Introduce and provide a Miro board with the tools including explanation, example and template. Add list of platforms that provide CX solutions that can help in this project 	<ul style="list-style-type: none"> Find a way to make the guide and the miro board a regular thing that is used in projects 	

Journey Steps	Awareness/Knowledge	Consideration & Conversion	Service Experience & Retention	Migration
Actions	<ul style="list-style-type: none"> is looking for ways to expand his capabilities Hears about Guide because Audrey & use during their project Talks about CX with TT and VODW colleagues (D&A/US/AM) 	<ul style="list-style-type: none"> Sees the Guide in the context of their thesis reports Knows CX is a term colleagues talk about and is interested in their current project Down to earth and approachable because of CX's relatable story economy Sees the guide on technology consulting's "bookshelf" 	<ul style="list-style-type: none"> Finds interesting numbers about CX and CX tech development in Financial sector Results about VODW, their CX and CX tech but they are more than Figma designers Explores success story from EU US and CX are combined in financial project Saves the Guide and favorite tools that can help him in his next project 	<ul style="list-style-type: none"> Offers to help colleague with the tools and strategies he learned about Approached VODW during IO
Needs and Pains	<ul style="list-style-type: none"> AVoid: lack of visibility AVoid: make Guide a part of their projects AVoid: lack of relevance of CX also when it's not needed AVoid: getting overwhelmed about CX in D&A general database 	<ul style="list-style-type: none"> AVoid: Guide should be easy to find and reach out for AVoid: Added value of their work that they need to do AVoid: making the guide less for their knowledge AVoid: making the guide less available 	<ul style="list-style-type: none"> AVoid: CX is explained in his language AVoid: clear understanding of VODW so they can help him AVoid: avoid or information removed for this form 	<ul style="list-style-type: none"> AVoid: Guide is used during their project AVoid: Guide is added to other colleagues AVoid: Guide being left in some sort of storage
Touchpoint	<ul style="list-style-type: none"> word of mouth FIGJTB made by colleagues on Miro 	<ul style="list-style-type: none"> digital guide physical guide 	<ul style="list-style-type: none"> digital guide physical guide Miro template board 	<ul style="list-style-type: none"> physical guide
Customer Feeling	🙄	🙄	🙄	🙄
Backstage	<ul style="list-style-type: none"> Increase visibility of the CX Guide outside of projects 	<ul style="list-style-type: none"> Make the guide easy to navigate. From a first glance it should be clear what it is about. Add numbers and facts that appeal (and make sense) to the target audience 	<ul style="list-style-type: none"> Add CX technology trends to Guide Add comprehensive example from another EY office (UK/US/AUS) to illustrate what CX means for technology consultants 	<ul style="list-style-type: none"> Make use the guide doesn't end somewhere on a pile of other files Add more CX resources when the guide has been explored and someone wants to read more about it

Journey Steps Which step of the experience are you describing?	Awareness/Knowledge	Consideration & Conversion	Service Experience & Retention	Migration
Actions What does the customer do? What information do they look for? What is their context?	Newly joined the team and has not been assigned to a project (yet) Has to go through onboarding process and trainings Becomes aware of the guide during onboarding process	Sees the Guide in the pile of onboarding files Chooses to explore the Guide because it's advised by community/network Gets the physical book of the book shelf to scan through it	Becomes interested because reads the manual which is relevant to his Engages with the Guide to better understand CX in practice Starts the digital file to check with the future	Encourages the next new joiner to explore the Guide
Needs and Pains What does the customer want to achieve or avoid? What is not working? <i>Tip: Try to formulate these consistently to reduce ambiguity. Here we use the first person.</i>	Achieve create feedback points and interest in CX Avoid make the manual boring as it is only for design/view	Achieve aesthetically pleasing layout but easy to read Achieve understandable for someone with zero CX knowledge Avoid make the guide come across as too design-ish	Achieve Develop content of CX which is more for IT and how video can help Achieve Find the connection between CX and IT Avoid the guide become a one-time-read	Achieve New joiner address the pain at the guide book as they have to look at the guide as well Avoid the next joiner doesn't do anything with the guide afterwards Achieve New joiner is happy to go to when he has questions about CX
Touchpoint What part of the service do they interact with?	word of mouth	word of mouth digital guide Physical guide	digital guide Physical guide	digital guide Physical guide
Customer Feeling What is the customer feeling? <i>Tip: Use the emoji app to express more emotions</i>			 	
Backstage	Make CX Guide part of the onboarding starter kit	CX Guide should balance looking aesthetic and serious, not for designers, but for consultants	Find CX-related technology trends and disruptive technologies in financial sector to add to the relevance of CX Include case study from another EY office	Find a way to make the guide easy to use, safe, keep close and don't lose in pile of other files

