



CUSTOMER EXPERIENCE: A FRAMEWORK FOR MANAGING AND DELIVERING VALUE TO CUSTOMERS

EXPERIÊNCIA DO CLIENTE: UM *FRAMEWORK* PARA GESTÃO E ENTREGA DE VALOR AOS CLIENTES

EXPERIENCIA DEL CLIENTE: EL MODELO PARA LA GESTIÓN Y LA ENTREGA DE VALOR A LOS CLIENTES

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ABSTRACT

Objective: To introduce and present a framework that describes the stages of designing, planning, and implementing projects in order to deliver value and experience to customers and to support CX professionals. **Design:** This framework was organized to support professionals in managing customer experience projects through integrating marketing, innovation and services based on lean startup principles. **Results:** The framework encompasses five stages: (i) customer research; (ii) idea development; (iii) prototyping; (iv) measuring and sharing results; and (v) scaling up following the lean startup principles: building, testing (measuring) and learning are recorded at each interaction and iteration. **Originality and Value:** The customer experience framework integrates service design, customer journey, and touchpoints (omnichannel) techniques, among other practices, in order to support CX professionals.

Keywords: Customer Experience; Customer Value; Customer Journey; Framework.

RESUMO

Objetivo: Introduzir e apresentar um *framework* que descreva os estágios de desenho, planejamento e implementação de projetos visando entrega valor e de experiências aos clientes e, também, apoiar profissionais de CX. **Design:** Para tanto, um *framework* foi proposta para apoiar os profissionais na gestão de projetos de experiência do cliente integrando marketing, inovação e serviços inspirado nos princípios de *lean startup*. **Resultados:** O *framework* propõe cinco estágios: (i) pesquisa do cliente; (ii) desenvolvimento de ideias; (iii) prototipação; (iv) mensurar e compartilhar resultados; e, por fim, (v) escalonamento. E os princípios de *lean startup* estão presentes na medida em que os projetos são construídos, testados (e mensurados) e são registrados os aprendizados a cada interação e iteração. **Originalidade e Valor:** O *framework* de experiência do cliente integra técnicas de *design* de serviços, jornada do cliente, pontos de contato (omnichannel), entre outras práticas, com vistas a suportar os profissionais de CX.

Palavras-chave: Experiência do Cliente; Valor ao Cliente; Jornada do Cliente; *Framework*.

RESUMEN

Objetivo: Introducir y presentar un modelo que describa las etapas de diseño, planificación e implementación de proyectos con miras a entregar valor y experiencias a los clientes y también apoyar a los profesionales de CX. **Diseño:** Así, se propuso un modelo para apoyar a los profesionales en la gestión de proyectos de experiencia del cliente, integrando marketing, innovación y servicios inspirados en los principios de *lean startup*. **Resultados:** El modelo propone cinco etapas: (i) investigación de clientes; (ii) desarrollo de ideas; (iii) creación de prototipos; (iv) medir y compartir resultados; y, finalmente, (v) escalada. Los principios de *lean startup* están presentes a medida que se construyen, prueban (y miden) los proyectos y se registra el aprendizaje en cada interacción e iteración. **Originalidad y Valor:** El marco de experiencia del cliente integra técnicas de diseño de servicios, recorrido del cliente, puntos de contacto (omnichannel), entre otras prácticas, con el fin de apoyar a los profesionales de CX.

Palabras-Clave: Experiencia del Cliente; Valor del Cliente; Recorrido del Cliente; Modelo.

1. INTRODUCTION

Experience marketing has become the focus of many organizations. Instead of driving standardized offers to the market aiming at consumer satisfaction in the acquisition of products and services, the new proposal is to provide buyers with a wide range of benefits including total experiences at the time of purchase (Botton et al, 2018; Hwang & Seo, 2016). In this approach, organizations must consider not only the scope of the marketing itself, but the surroundings and the context of the commercial activity, taking into account all the touchpoints involved in a commercial transaction and making them the best possible (Palmer, 2010). For Holmlund et al (2020), an experience is, above all, a personal event, often with relevant emotional implications, based on the interaction with stimuli driven by the products or services offered.

It is noted that the change in this form of approach led to a new vision of value creation. In the traditional vision, the company creates value. In the new vision, the company offers value, but it is the customer who really creates the value. Participating and getting involved in the process creates value co-creation (Izquierdo-Yusta, Jimenez-Zarco-Martinez-Ruiz, 2021). The environments for the experiences must be innovative, and the recommendation is that companies build a network of experiences with some flexibility, in order to enable consumers to participate and personalize their experiences (McColl-Kennedy et al, 2015). Therefore, the co-creation of experiences, rather than offers, seeks to involve the active participation of customers and engage them in the

development of services that deliver unique values to each customer (Prahalad & Ramaswamy, 2014). Kuehnl, Jozic & Homburg (2019) show that experiences can result in changes in attitude or behavior.

Since the 2000s, the expression “customer experience” (CX) –, together with the expressions service design, growth hacking and lean startup, have been incorporated into business practices that integrate marketing, services and innovation. There have been several works addressing the design, planning and management of service design, growth hacking and lean startup, which present systematic, structured and detailed models and frameworks for project design (Kandampully, Zhang & Jaakkola, 2018). However, the same cannot be said of customer experience. Because they work in the area as researchers and consultants in companies, these authors detected that there was no robust framework with well-designed stages that could guide the design, planning and management of customer experiences, as occurs in the other practices mentioned above. These authors sought, therefore, based on a literature review on customer experience topic, to build and propose a framework that could support the activities of professionals in the area.

It should be pointed out that managing the customer experience requires a knowledge of the touchpoints that affect customer perception and loyalty. Thus, in order to influence customer interactions, the organization should create or adopt a customer-centric approach to support the business platform (Kim, Kim & Miner, 2009). The aim of customer experience is to build a “goodwill” ecosystem that costs relatively little to maintain, but can deliver a loyal customer set that generates tangible returns. It is observed, in the KPMG Report (2019), that there are six axes that organizations need to focus on in customer experience projects: (i) integrity; be reliable and robust; (ii) expectation; knowing the customers; (iii) resolution; customers must feel good about the experience; (iv) time and effort; aiming to remove obstacles, impediments and bureaucracy; (v) personalization; a key component of the experience, which includes individualized attention; and (vi) empathy; the customer’s emotional capacity and understanding of a particular experience.

It should be recognized that the customer experience encompasses a holistic perspective on the organization's business, brand, product and service. Experience is not merely serving the customer. Customer service is an element of the entire experience. That is, experience is greater than customer service, as it includes all touchpoints a customer has with the organization (Grace & O’Cass, 2004). Taking into account the growing demand for innovation, service quality, customer focus, and also the absence of frameworks that enable the design and management of more efficient and effective customer experience projects, the following problem was considered: “What are the stages of building and delivering value to customers in order to support CX professionals in preparing, planning, and implementing customer experience projects?”. To this end, the following goal was proposed: To introduce and describe a framework that describes the stages of preparation, planning and implementation of projects, aimed at delivering value and experiences to customers and also supporting CX professionals.

It should be stated that this study is a theoretical trial, without empirical research. As such, it aims to (i) seek to present positions and models on the topic, (ii) point out the contributions of each of the models and (iii) present a theoretical contribution through a framework in order to contribute to the areas of marketing, innovation and services (Meneghetti, 2011). Thus, the authors of this theoretical trial aim not only to summarize the contemporary literature on the topic, but also to present perspectives and contexts and contribute to the advancement of the subject in the scientific and business areas, with the aim of improving the delivery of value, benefits and customer experiences.

2. UNDERSTANDING CUSTOMER EXPERIENCE

Experiences can be defined as events occurring in response to a stimulus. In marketing, experience is a spiritual phenomenon that understands consumption as a primarily subjective as well as a conscious state, with a variety of symbolic meanings, hedonic responses, and aesthetic criteria. Therefore, the consumption experience is an evolution of the existing concept between the consumer and the company, in which the experience is individual and requires the rational, emotional, sensorial and spiritual involvement of the consumer (Pine & Gilmore, 1998; 1999). Overall, a consumer experience is a mixture of a company's physical performance and evoked emotions measured through the customer’s expectations at every touchpoint. Hence, experiences represent a raising the level of physical and emotional expectations at every moment of customer contact. Therefore, the consumption experience becomes a sustainable source of experience communication and not just a short-term event aimed only at spontaneous communication (Smilansky & Henard, 2001).

The expression customer experience was first addressed in the 1980s by Holbrook and Hirschman (1982), in their study of the perception of the consumption experience. Carbone and Haeckel (1994) and Pine and Gilmore (1998; 1999) popularized the term in their marketing studies in the 1990s. In the 2000s, Gentile, Spiller, and Noci (2007) improved the concept, including interactions between customer and product (and/or service) as the “core” of creating an experience. They also added personal experience through rational, sensory, physical, emotional and spiritual dimensions. Walls et al (2011) characterized experiences as personal and exceptional, as they encompass the participation of customers emotionally involving them so that they are shared and

remembered. However, customer experience is particularly relevant for services. Pine and Gilmore (1999) sought to exemplify the application of customer experience projects in services such as entertainment, aesthetics, education and escapism.

It should be recognized that an experience is nothing more than the attractiveness designed with the purpose of stimulating the customer's emotions. As an activity, emotion can lead to consumption, driven by the mood of the moment, with the aim of promoting consumption associated with an emotion experienced in the past (Izquierdo-Yusta, Jimenez-Zarco-Martinez-Ruiz, 2021). Thus, an event can be such a landmark, for the customer, that their future choice will no longer be determined by the binomial quality versus price but by the binomial emotional versus other brands (Bolton et al, 2018; McColl-Kennedy, et al, 2015). There are seven considerations that should be incorporated into the design of customer experiences:

- Experiences must be created with the purpose of continuously going beyond the physical and emotional expectations of customers: the idea is not to focus on the physical aspects only, but on the emotional ones (Klink, Zhang & Athaide, 2020);
- An experience generates profit and, as such, it should be able to significantly reduce costs: making economic experiences viable (Adhikari & Bhattacharya, 2018);
- An experience should be conceived from the “outside-in”, rather than the “inside-out”: the customer must be at the center of an organization’s attention – customer-centricity (Kandampully, Zhang & Jaakkola, 2018).
- An experience should be an element of long-term competitive advantage, focusing on customer retention for future gains (Walkowiak, 2017).
- An experience must be differentiating, that is, focusing on stimulating planned emotions: you should plan exactly what you intend to evoke (Homburg, Jozic & Kuehnl, 2017);
- An experience is possible from an inspiring leadership, in other words, a culture of empowerment and empathetic people who feel happy: endomarketing and endobranding can be critical (Yoon & Lee, 2017).
- Experience of personalizing and dignifying the brand: which involves building trust with customers (Izquierdo-Yusta, Jimenez-Zarco-Martinez-Ruiz, 2021).

Historically, marketing, retail, and service management literature have not addressed the topic of customer experience much. Researchers have focused on measuring customer satisfaction and service quality (Parasuraman Zeithaml & Malhotra, 2005; Verhoef et al, 2009). A few researchers, such as Holbrook and Hirschmann (1982), have theorized that consumption has experimental attributes. Schmitt (1999) explored how organizations designed experiential marketing by making customers perceive, feel, think, act, and relate to the organizations' offerings and brands. Berry, Carbone and Haeckel (2002) point out that a competitive organization should offer satisfactory experiences to customers, and that it is up to marketing managers to “orchestrate” the clues so that customers notice them in interactions with the organization. Satisfaction or dissatisfaction is an essential result of the customer experience; however, the difference between satisfaction and experience should be considered.

Schmitt (2003) categorically characterized satisfaction as a result-oriented attitude, and experience as process-oriented. Puccinelli et al (2009) share Schmitt's (2003) explanation. Meyer and Schwager (2007) add that customer satisfaction is the accumulation of a sequence of experiences, where the degree of satisfaction is the “net” result of calculating the good experiences minus the bad experiences. According to Kandampully, Zhang and Jaakkola (2018), net experiences comprise four elements: creativity, technology, omnichannel and service quality. Rowley (1999), in his study, defended the total experience as an absolute concept, which is customer satisfaction derived from a series of interactions with customers. Maklan and Klaus (2011) observed that actual experience is an important predictor of satisfaction. Customers who have negative attitudes will evaluate satisfaction negatively. Therefore, the ratio between experience and satisfaction has been addressed in several marketing studies. For Berry and Carbone (2007), for example, the more favorable the experience, the greater the satisfaction.

Therefore, customer experience emerges from a set of interactions between the customer, the product (and/or service) and an organization's brand, in order to generate reactions (Gentile, Spiller & Noci, 2007). However, customer experience is still the subjective attitude that customers have towards any direct or indirect contact with an organization. Direct contact, on one hand, usually occurs during the process of purchasing, using and services, and is usually initiated by the customer. Indirect contact, on the other hand, generally includes unplanned meetings with representatives of the organization's products, services or brands, and takes the form of suggestions or criticisms (buzzmarketing), advertising, evaluations, etc. (Kuehnl, Jozic & Homburg, 2019). In addition, the customer experience approach is holistic in nature, and includes the customer's cognitive, affective, emotional, social, and physical attitudes toward the organization. Thus, a customer experience project should include the total experience, contemplating the search, purchase, consumption and post-sales phases of the experience, and can include several channels – omnichannel (Barwitz & Mass, 2018).

Consequently, the customer experience encompasses all the communications that a customer has with an organization throughout the life cycle – as a customer –, whether in person, via online platforms or even by telephone. An efficient and effective customer experience project has as its “core” a clear and attractive value proposition. In short, a product and/or service that satisfies the customer’s need and desire and must also be associated with a short- or long-term purpose (Epp & Price, 2011). Naturally, a customer experience project, in order to be successful, requires coordination between different departments of an organization, for example, marketing, product development, innovation, customer service, services, operations and retail units (McColl-Kennedy et al, 2015). The benefits of a customer experience project should connect customers and businesses (Epp & Price, 2011; Hamilton & Price, 2019):

- Customers benefit when products (and/or services), brands and experiences – value proposition – are designed and delivered according to their expectations. Hence, customer orientation enables the offer to be better adapted to their lives, giving them relevance, convenience and accessibility.
- Businesses deliver value when customers buy and consume. Thus, value propositions include the purchase or consumption of products and/or services, through to the reputation of the brand image, loyalty, and the customer relationship. A customer orientation allows the manager to adjust the portfolio of offerings to the market in order to achieve customer loyalty and retention.

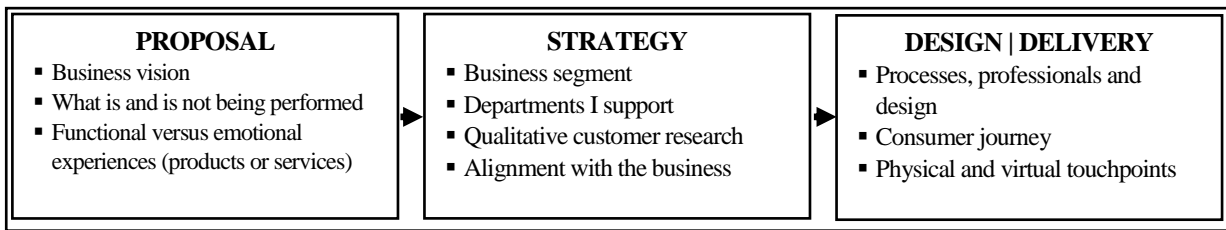
The customer experience approach focuses on delivering the potential value of a customer-centric business model, as well as recognizing customer needs in order to orchestrate better tools to address this transformation within an organization (Payne, Storbacka & Frow, 2008). Overall, customer experience requires three categories of business changes for a given organization (Kuehnl et al, 2019; Voorhees et al, 2017):

- Switch from a strategy focused on the portfolio of products and/or services that seeks to identify the most valuable customers to a strategy focused on the customer portfolio, seeking to enhance customer service and relationship (Holmlund et al, 2020);
- Switch from a culture that rewards employees simply for increasing sales to one that rewards teams that solve customer problems in order to build bonds with them (Voorhees et al, 2017);
- Switch from an organizational structure in which teams operate across product silos and interact with functions only when they need to place an offering to market. Kim, Kim and Miner (2009) argue that a favorable organizational structure is one in which business units are connected through employees and departments that come together around the needs and segments of a group of customers.

3. CUSTOMER EXPERIENCE PROJECT MANAGEMENT: CONTEXTS AND PERSPECTIVES

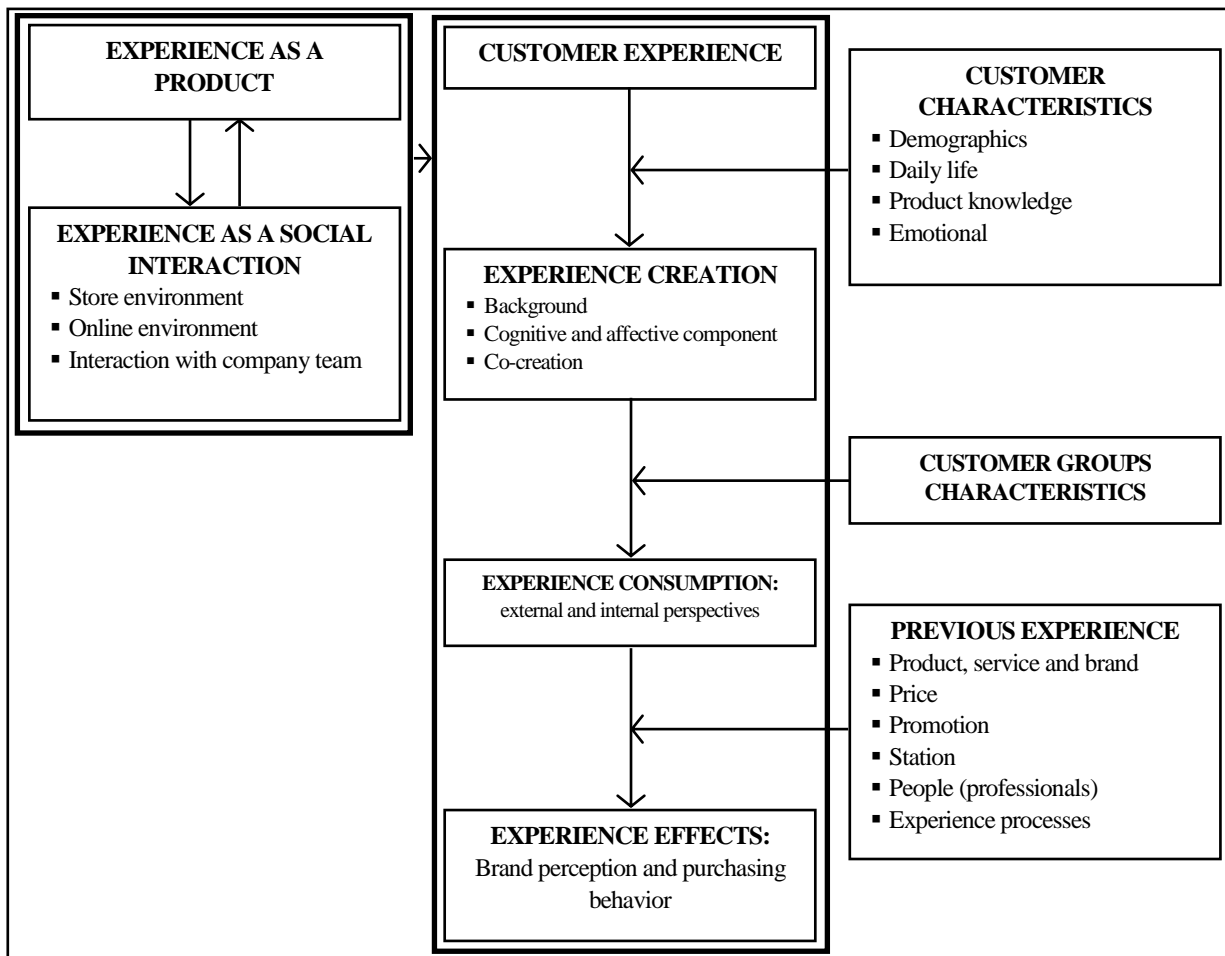
There are five models and/or frameworks that served as a reference for building insights for the framework that will be presented by the authors of this study in this trial. Klink, Zhang and Athaide (2020) developed a framework structured around three axes: (i) customer experience proposal; (ii) strategic focus on customer experience; and (iii) design, operation and delivery of the customer experience. Overall, Klink, Zhang and Athaide (2020) point out four elements of success in a customer experience project: (i) creating a cultural mindset that integrates marketing, innovation, services and processes; (ii) having an in-depth understanding the sector or segment in order to develop a project that meets the customers’ perspectives; (iii) knowing the touchpoints (channels) as well as the customer’s journey; and (iv) putting the experience proposal into practice and then testing it, in order to see if the processes, the professionals and the physical and the virtual design of the channels meet the customers’ expectations, see figure 1. The framework of authors is generic as regards context and perspective, as it is appropriate for any business model aiming at developing a customer experience project.

Figure 1.
Customer Experience Management Framework



Source: Klink, Zhang and Athaide (2020)

Figure 2
Customer Experience Management Framework in the Tourism Sector



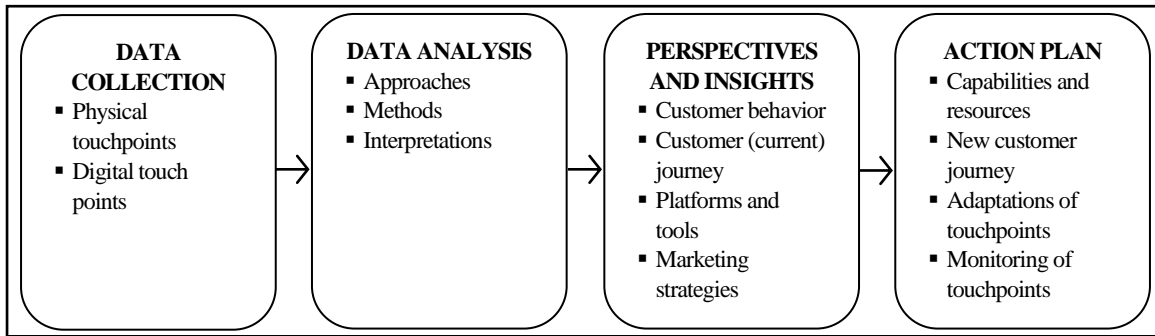
Source: Adhukari and Bhattacharya (2015).

Adhukari & Bhattacharya (2015) present a framework driven by the experience of tourism consumption and related products that do not provide traveler experiences, but create sensory feelings when travelers interact directly or indirectly with the company. In the first section, experience as a product and experience as social interaction are addressed. In the second section, the authors describe the customer experience in three stages: creation, consumption and effects, see figure 2. The third section addresses the characteristics of individual and group customers, in addition to previous experiences. This framework highlights the experience in two ways: pure product experience and mixed product experience. Pure experience seeks to involve travelers in the process of creating and consuming experiences. The mixed product experience refers to the tangible as well as intangible components associated with the experience.

Holmlund et al (2020) introduce a customer experience framework associated with Big Data Analytics (BDA). This model describes four arrangements required for managing the customer experience: (i) data collection implies an active and constant attempt to collect customer data at physical and digital touchpoints in order to understand their behavior and participation; (ii) data

analysis seeks to employ BDA to analyze customer experience data. BDA is capable of performing four types of analysis: descriptive, inquisitive (diagnostic), predictive and prescriptive; (iii) perspectives and insights refer to understanding customer behavior and journeys, platforms and tools, and also the marketing strategies employed by the company; (iv) the action plan aims to focus on the execution of the customer experience regarding the improvement of resources, construction and adaptation of new journeys and, also, adjustments and monitoring of customer touchpoints; see figure 3. For the authors, the customer experience must be part of the company's culture. However, data should be an extension of customer experience management, with a view to developing strategic solutions that customers may adhere to.

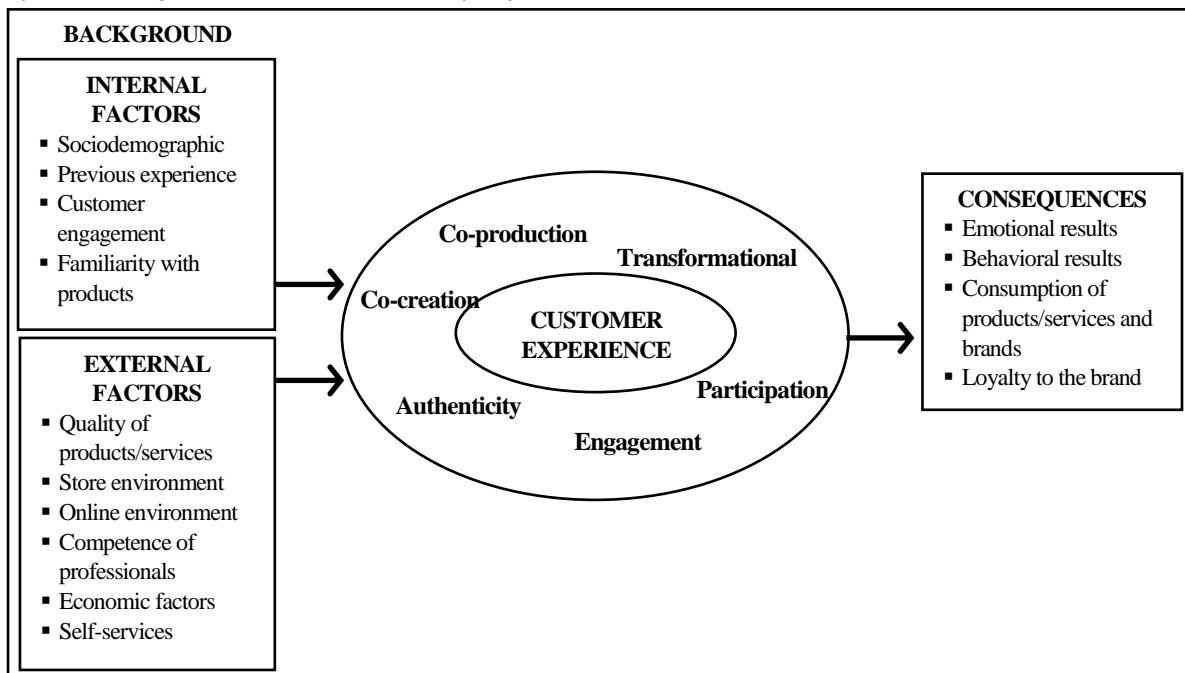
Figure 3.
BDA-based Experience Management Framework



Source: Holmlund et al. (2020).

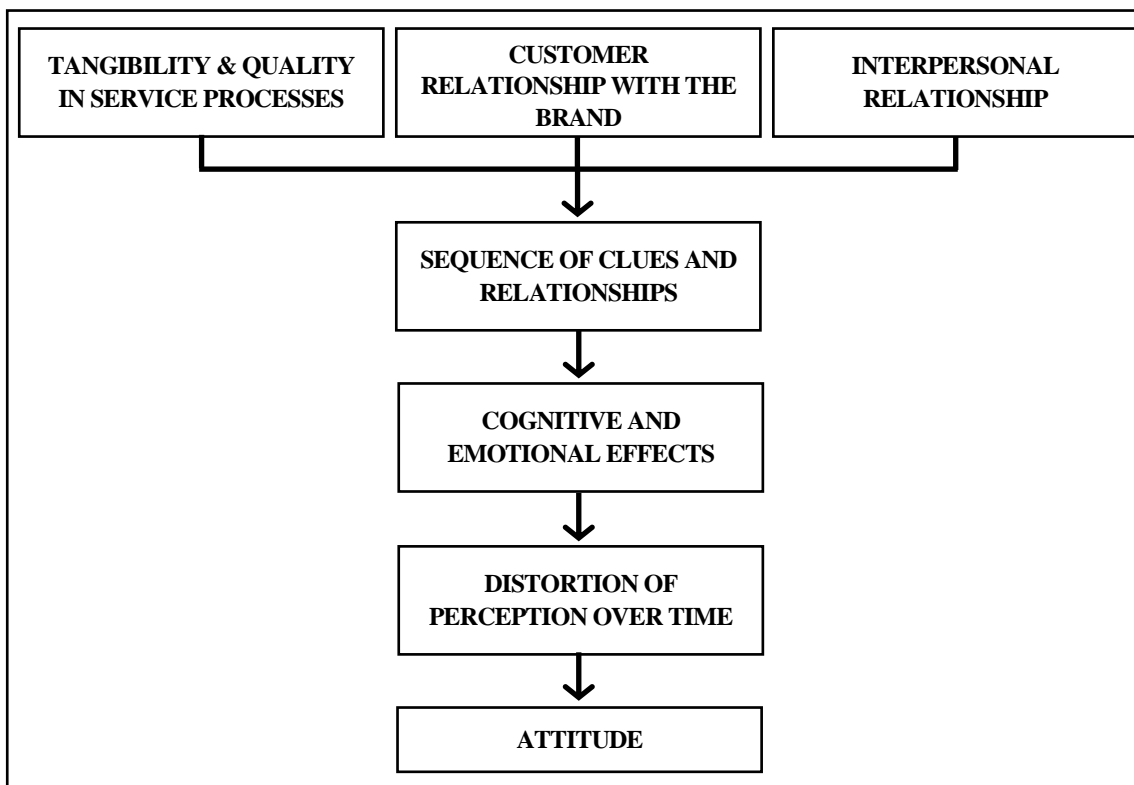
Hwang & Seo (2016) present a customer experience management framework based on the hospitality and tourism sector. This model is supported by three perspectives: (i) the background to the experience, which includes both internal and external factors; (ii) the customer's experience, with elements generating value for the customer, including co-creation and co-production of services; and (iii) and the consequences or results of the experiences, which can be both positive and negative, and include emotional and behavioral results, consumption of products and services, and brand loyalty; see figure 4. The authors seek, through this model, to gain a knowledge of and discuss three characteristics of the customer experience: (i) feedback on customer experiences; (ii) customer participation in the service process; and (iii) stakeholder involvement.

Figure 4.
Experience Management Framework based on Hospitality and Tourism



Source: Hwang & Seo (2016).

Figure 5.
Experience Management Framework for Customer Attitudes



Source: Palmer (2010).

The final framework, designed by Palmer (2010), comprises an integrated proposal that starts with basic stimuli for the customer: tangibility and quality in service processes (SERVQUAL), the customer's relationship with the brand and interpersonal relationship – brand image for the customer. Next, the customer's attitude towards the experience promoted by the company goes through a series of “clues” for building relationships aiming to drive both cognitive and emotional effects and resolve possible negative perceptions or distortions over time; see figure 5. Thus, the author attempts to explain that the customer's experience may result in the weighting of attitudes over time in his/her (customer) relationship with the brand (or company).

It should be recognized that the framework by Klink, Zhang and Athaide (2020) can be adapted to different business proposals, as it has a flexible structure. The proposal by Adhukari & Bhattacharya (2015) emerges as an option for the tourism sector. In the model by Holmlund et al (2020) it is possible to observe how data and tools based on Big Data principles can model attractive customer experiences. The framework by Hwang & Seo (2016) suggests co-creation, co-production and a more active participation of the customer and stakeholders in building the experience. Finally, Palmer's proposal (2010) discusses the stimuli for creating experiences that translate into positive attitudes towards the brand. There is no doubt that the framework proposed by these authors (trial) has elements of each of these models. However, the authors intended to present a more systematic framework, with detailed stages, in order to guide and serve as a reference for professionals preparing and managing an experience project for their customers.

4. CUSTOMER EXPERIENCE PROJECT VALUE GENERATORS

Customer value drivers will depend on the stages of the customer lifecycle. For Johnston and Kong (2011) and Hamilton and Price (2019), the customer lifecycle structure encompasses eight stages: (i) latent need – the potential customer does not know the offers; (ii) need recognition – the potential customer is aware that their need can be met through an offer; (iii) research – the potential customer searches for several options of offers that can meet their needs; (iv) selection – the customer decides to choose an offer; (v) onboard – the customer interacts with the offers through processes, such as filling out forms, buying or renting offers, usage training, etc.; (vi) usage – the customer engages with the offers, and learns and creates new uses and benefits; (vii) “upward” migration – the customer decides to update their profile by increasing their offer consumption rate, then the customer relationship management (CRM) is put into practice to reach the customer (Berry & Carbone, 2007); (viii) “downward” migration – the customer

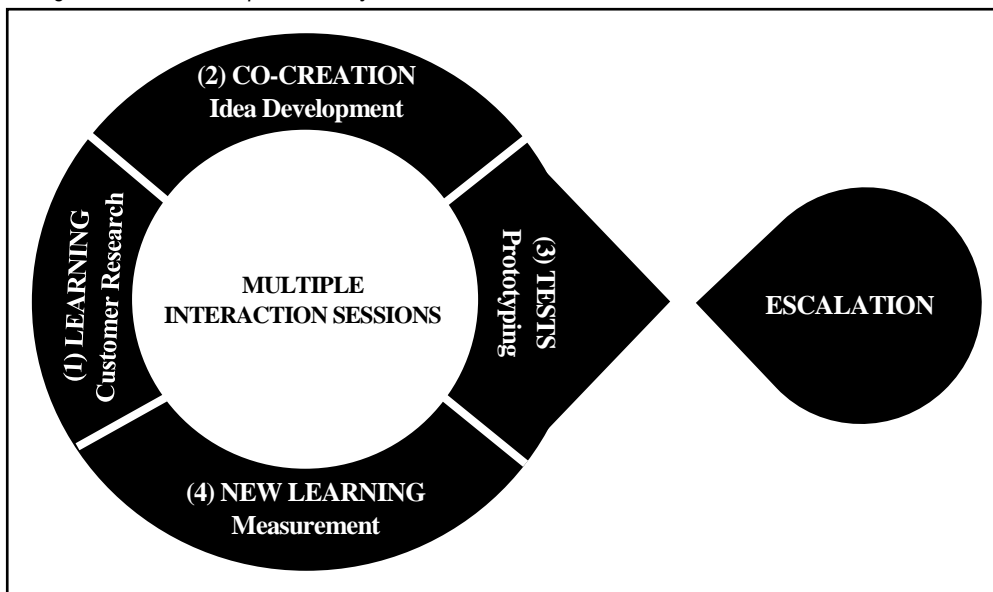
reduces consumption. Therefore, data analysis should be required for decision making regarding the status of the customer's profile in a specific period.

According to Gentile, Spiller and Noci (2007), customer value drivers require attention because customers have different needs and expectations. Prahalad and Ramaswamy (2004) point out that the higher the drivers, the more satisfied the customers will be. However, the opposite, according to Pullman and Gross (2004), is also valid. The literature shows that there are eight main drivers of customer value (Berry, Carbone & Haeckel, 2002; KPMG Report, 2019; Meyer & Schwager, 2007; Sujata et al, 2015; Walls et al, 2011): (i) speed – time taken in the steps of the process to complete the purchase or rent; (ii) convenience – practicality for the customer, with minimal interruptions; (iii) risk – risk of purchasing or renting, or even not receiving the product or service; (iv) flexibility – ability to adapt processes to the culture, habits and customer purchasing behavior; (v) relationship – ability of customers to engage with employees in the co-creation or co-production of offers, with the purpose of customizing or personalizing them (Prahalad, & Ramaswamy, 2004); (vi) information – access, understanding and guidance through information that improve the choices of offers; (Puccinelli et al, 2009); (vii) costs – financial, psychological, time and effort involved in buying or renting offerings; (viii) emotion and comfort – level of physical and emotional comfort to experience and interact with the organization's offers (Schmitt, 2003).

Verhoef et al (2009) report that a critical component of customer experience project is the choice of compensations among value drivers. On one hand, a process improvement designed to maximize an organization's customer service capacity can reduce the employees' needs. On the other hand, fewer employees can reflect weaker customer relationships, as it reduces their comfort levels. Maklan & Klaus (2011) also point out that there can be conflict between trying to maximize speed for customers and managing financial risk due to fewer diligence checks. In such situations, an organization will need to lead, with CX managers, in an assessment of decision trade-offs. In addition, as Szymanski & Henard (2001) explain, it is useful to develop a list of "non-negotiable" items that can serve as "pillars" on which to base a customer management plan.

For Homburg, Jozic and Kuehn (2017), no customer experience project can start in the right way and produce desired results unless the organization structures three key elements: (i) cultural mindset, that is, customer journey orientation in the touchpoints, in order to understand the pre-purchase, purchase and post-purchase of the customer, their feelings and create loyalty; (ii) strategic drivers, in short, connecting customer touchpoints through consistent and cohesive content, exploring themes and contexts that are aligned with the customer and inviting them to participate, get involved and co-create and co-produce experiences; (iii) capabilities and resources of the organization, which translate into the atmosphere in the store, professional skills and adequate communication at all touchpoints. The authors state that the essence of generating value from an experience is linked to the contact between customer, team and brand.

Figure 6.
5 Stages of a Customer Experience Project



Source: Authors (2021).

The design of a customer experience goes through a series of stages. According to Holmlund et al (2020), the customer experience has six stages: strategy, evaluation, research, decision, implementation and learning. However, for the authors of this trial, there are five steps that comprise a customer experience project, all of which occur interactively, see figure 6 – macro and overview – and figure 7 – detailed framework view – in the next topic (4. Customer Experience Project Stages). Each of the stages is described in Table 1. It should be noted that not all stages are required for customer experience projects, as there are projects that may only require customer research, while others may only require prototyping. Finally, this framework is based on the Lean Startup principles, a proposal that has been used in innovation projects that integrate design thinking, user experience (UX), business canvas, minimum viable product (MVP) and growth hacking.

Customer experience projects require some key elements to support practices. These practices are operational, and are extremely essential to achieve significant results. There are four elements that are equally relevant (Gentile, Spiller & Noci, 2007; Johnston & Kong, 2011; Hamilton & Price, 2019; Verhoef et al, 2009): (i) leadership – projects require robust support from the management to remain faithful to the organization's strategic mission and also to ensure that the project remains a priority when faced with difficult compensations; (ii) cross-functional teams – the projects integrate departments and/or sectors such as product, marketing, sales, innovation, operations, service, etc. – and will require the formation of cross-functional work teams, with a customer experience manager who is fully dedicated to conducting the project (Kim, Kim & Miner, 2009); (iii) budgets – customer experience projects require a separate budget in order to fund the activities, even though the project is performed by cross-functional teams; (iv) performance – managers must establish metrics and KPIs (Key Performance Indicators), in order to ensure that the goals are being achieved.

Table 1.
5 Stages of a Customer Experience Project

Stages	Description
(1) Learning	The purpose of customer research is to develop an understanding of their needs, the financial life and the macro environment in which customers are situated. The human-centered design methods that should be used for this research are quantitative – statistical – or qualitative – more empathic (recommended).
(2) Co-creation	Next, research ideas and insights are interpreted for customer experience project through cross-functional co-design workshops. Ideas are produced, prioritized and then converted into prototype plans. These cross-functional teams should include professionals with customer-facing roles such as sales, innovation, product development, operations, marketing, etc. (Lin & Bennett, 2014).
(3) Tests	Ideas with high potential are tested with customers through prototypes. This involves creating cost-effective solutions to business problems and understanding how customers respond positively to changes. Co-design workshops, with cross-functional teams to create solutions, are often used in prototyping. External experts can be invited to obtain other points of view on the issue so that, together, they can design the best solution for customers (Maklan & Klaus, 2011; Prahalad & Ramaswamy, 2004; Sujata et al, 2015).
(4) New Learning	The impact of prototypes should be measured through customer satisfaction surveys to assess whether the customer experience project prototypes have added value. A cost-benefit analysis and Return of Investment (ROI) can be carried out to assess the success of the prototype. It should be noted that customer satisfaction surveys can be conducted with small samples of customers; however, surveys conducted by individuals aimed at seeking empathy with customers should be emphasized. These surveys may need to be changed several times in order to refine the results of the prototype (KPMG Report, 2020; Maklan & Klaus, 2011).
(5) Escalation	Successful prototypes – product or services – achieving superior performance in their measurement parameters are then scaled (or stimulated) across multiple platforms: physical and/or virtual.

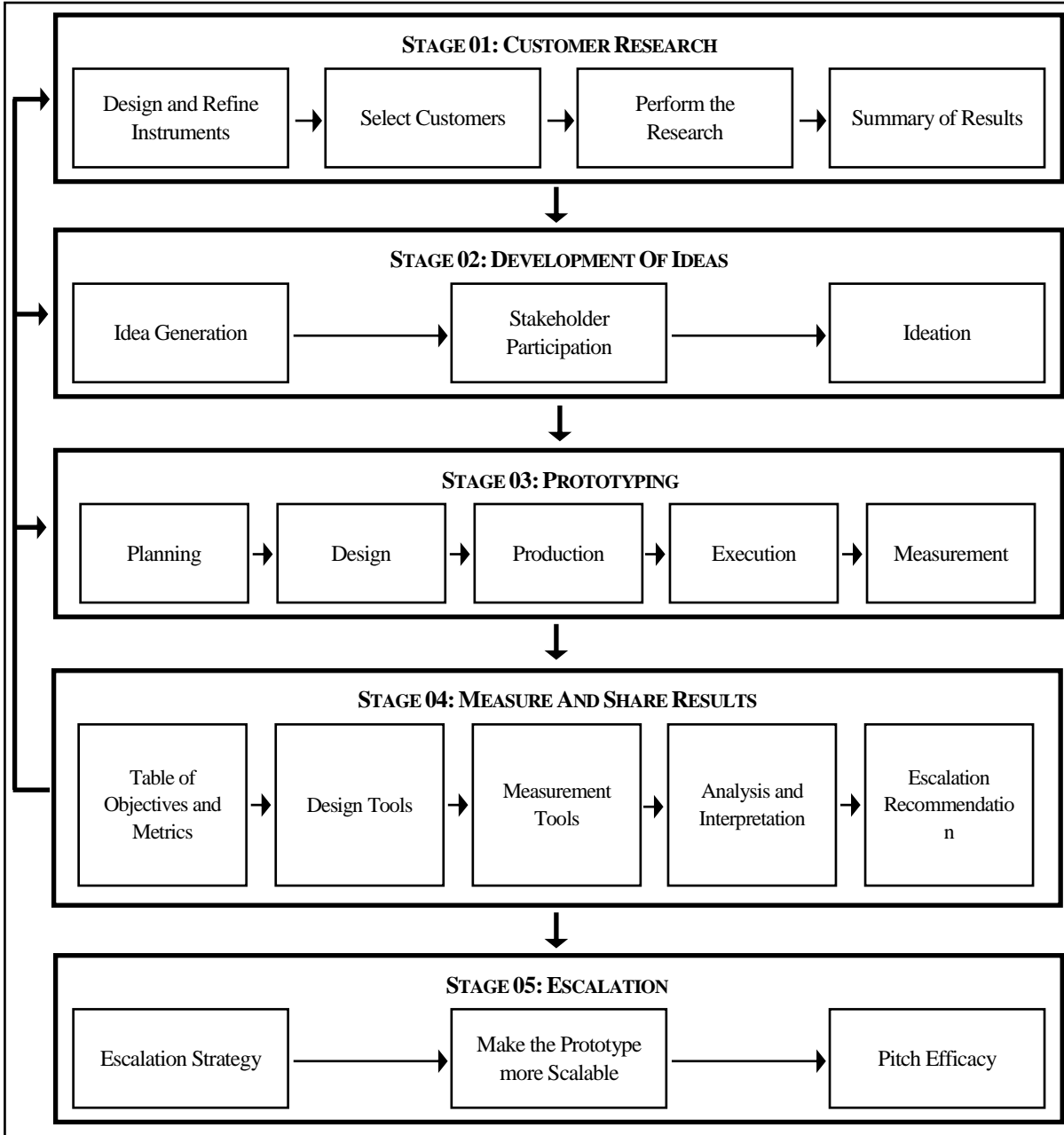
Source: Authors (2021).

5. STAGES OF A CUSTOMER EXPERIENCE PROJECT

The first stage addresses customer research through customer-centric design methods, see figure 7. Four processes are performed, in order to gain relevant insights that will give a deeper understanding of the customers: research design, participant recruitment, collection of data and analysis and synthesis of ideas and/or insights. The first process involves the development and refinement of instruments with a focus on customer problematic points and opportunities to improve the customer experience (Carbone & Haeckel, 1994). For Lin and Bennett (2014), the scope of the instrument requires asking customers to understand their

needs and journeys, rather than focusing only on interactions. There are three main methods: (i) internal research sessions to project key concerns and needs in customer contacts; (ii) field observation sessions to uncover hidden customer experiences and needs; and (iii) customer workshops to synthesize observations such as ideas, insights and customer experience project opportunities.

Figure 7.
Customer Experience Framework



Source: Authors (2021).

The second process involves the recruitment of customers to conduct the research. Between fifteen and fifty customers are usually considered in the scope of the research to generate deep insights. Customer profile and potential need to be carefully observed in this selection, and the research should take between 2 and 3 hours of interactions. The third process encompasses data collection, with research centered on observation, “discourses” and records of customers’ viewpoints. The fourth process is to gather, encode, debate and understand the main needs, ideas, opportunities and restrictions pointed out by customers in the interactions. Co-design, and also co-creation, between teams, customers and, where possible, partners, are efficient and effective mechanisms to build proposals for experiences that are aligned and synchronized with what customers really want from organizations (Pralhad & Ramaswamy, 2004).

The second stage aims to develop ideas from the customer experience project. IBarwitz and Maas (2018) state that the development of effective ideas to improve the customer experience must follow some operational principles: (i) it must involve departments can provide professionals with a deeper understanding of the different aspects that must be observed in customer management, e.g.,: marketing, operations, sales, logistics, etc. (Kim, Kim & Miner, 2009). Thus, ideas can be designed to involve cross-functional experiences; (ii) avoiding premature criticism, that is, all ideas must receive careful attention. Having the support of senior management is critical (Hamilton & Price, 2019); (iii) establishing parameters, metrics or indicators in order to classify ideas so that each one is evaluated objectively and not subjectively (KPMG Report, 2020); (iv) writing ideas in the form of stories, in order to communicate and expose, more clearly, with the purpose of encouraging debates and discussions on the personas – the customers – of the customer experience project (Voorhees et al, 2017).

This stage requires the CX team to manage multiple challenges. In Gentile, Spiller and Noci (2007), Johnston (1999) and Prahalad and Ramaswamy (2004) it can be seen that the challenges are related to co-creation and co-production: (i) ensuring that idea generation sessions create and track transformational opportunities to produce and deliver innovative solutions; (ii) ensuring that the idea generation sessions have broad collaborative participation of stakeholders from different functions, in particular, from the players in the process value chain, who are involved in the co-production and delivery of products or services to customers; (iii) the collaborators in the research and idea creation should be able to clearly articulate a value proposition for senior management, considering the customers' perceptions. Kuehnl, Jozic and Homburg (2019) point out that ideation is the moment the CX teams use to create a solution and brainstorm its usability, e.g. the necessary resources, actions to be taken, formation of work teams, etc.

Establishing a prototype customer experience project is the third stage. The prototype is an early version of a solution, and it may not have all the details of a final solution. The objective is to gather promising customer experience ideas and test them in order to obtain quick responses so that, after a few interactions, the experience improvement is included in the prototype as learning (Maklan & Klaus, 2011). Prototypes can cover new products, services or processes, or they can drive changes to existing offers – incremental innovation. A prototype must be planned, bearing in mind the short time available and the budget, both of which necessary to provide convincing answers to the hypothesis, previously designed and defined. It should be noted that prototyping encompasses five processes: planning, designing, producing, implementing and measuring (measure).

It is important to point out some relevant aspects related to the prototyping of a customer experience project. First, we need to understand “why”, in other words, the purpose – or benefit – of the prototype, clearly thinking about the value that will be directed to the customer. Second, prototypes are not pilots, as pilots tend to be implementations of an entire product, service, or process on a small scale, while prototypes tend to test specific components of them with a target customer group. Third, the customer experience perspective must be considered in interactions with the prototype, in order to provide relevant information. Fourth, the prototype must be fast and cost-effective. Furthermore, rapid prototyping is valuable in accelerating the launch of an offer to the market. It is worth mentioning that low-fidelity prototypes can lead to very useful learning and perceptions on what can be improved in the project. Fifth, prototyping requires less rigorous evaluation and approval parameters than those used for traditional or even pilot product and/or service projects. Ultimately, prototyping requires a separate budget to regularly improve the prototype after testing and iteration sessions (Kuehnl, Jozic & Homburg, 2019).

The fourth stage involves evaluating the prototypes to improve the customer experience. The main purpose is to measure and share the results. There are customer experience projects that, even at this stage, already measure the Return of Investment (ROI) of the prototype, in terms of purchasing behavior, as well as customer loyalty (KPMG Report, 2020). For Maklan and Klaus (2001) measurement aims to obtain rapid information from customers exposed to prototypes, in order to modify and adapt them continuously, e.g., including new perspectives or new customer learning in an improved version of the prototype. Verhoef et al (2009) point out that the measurement and evaluation of the prototype can be done through several methods: surveys, interviews, discussions in focus groups (focus group), analysis of customer data to observe indicators of the prototype before and after modifications, etc. Walls et al (2011) highlight that it is crucial to select methods based on the nature of the prototype and the customer characteristics. Thus, for the creation of reliable and successful prototypes in vertical scalability, five processes should be considered:

- i. *Objective measurement framework*: listening to suggestions or hypotheses from customers on how the prototype could improve the customer experience and the indicators that would need to be measured in order to assess whether the proposed improvements for the customer experience project have been achieved (Epp & Price, 2011).
- ii. *Design tool*: choosing a suitable research tool to measure the project's impact on customers – personas. Depending on the indicators that will be tested in the prototype. The design tool may be a customer research, focus group, an organization's existing customer data set, or even interactive sessions with customers (Gentile, Spiller & Noci, 2007).

- iii. *Execution of the measurement tool*: during the execution phase, the customer experience project manager needs to decide on the sample of customers in the research, that is, through the tool that was defined, determine the number of customers that will be exposed to the prototype. Where applicable, the manager also accesses databases and information of interest on customers who were not exposed to the prototype, to complement the information base (Johnston & Kong, 2011).
- iv. *Analysis and interpretation of results*: grouping, ordering and structuring the data and information obtained and producing the results from interactions with customers. In Payne, Storbacka and Frow (2008), it can be observed that the results must be grouped into those not achieved and those achieved, using a framework for measuring objectives, and also insights or new ideas proposed by customers. These results can show whether the customer experience project is appropriate from the customer's perspective.
- v. *Recommendations for escalation*: having achieved the appropriate results, the customer experience project will need to be scaled and tested again. This process involves the presentation of the resources of the prototypes to obtain new data and information in situations of use and/or consumption of the customer experience. Measurements will reveal whether or not the performance meets customer expectations. At this point, there may be insertions or modifications to the project, or the resources may be reduced (Voorhees et al, 2017).

Producing successful customer experience prototypes is not enough if they are not accepted by a large number of the organization's customers. This is where the difference between the mission and objective of the customer experience project lies. Objectives may have been met, such as delivering a customer experience project as planned. However, the project, even when well executed, may not deliver the full experience to customers and, therefore, may not generate customer satisfaction. Kuehnl, Jozic and Homburg (2019) state that this is called lost value, that is, the customer experience project has been delivered, but it is suboptimal. It is understood that the adoption, use and consumption of the experience by a large number of customers are key elements for the success of a customer experience project, as it ensures that the prototype has been tested, and also that it has generated trust and credibility with customers.

Escalation, the fifth and final stage, comprises three processes that can be carried out interactively by CX teams. First, building escalation strategies that reflect and scale the organization's strategies – mission, objectives, goals, positioning, etc. In short, the strategy is developed considering the interests of the organization's internal and external stakeholders (Parasuraman, Zeithaml & Malhotra, 2005). The next process seeks to make the prototype "more scalable", that is, the use of "hacks" – which are experiments. Techniques such as growth hacking are used by startups to scale a large volume of customers through technologies to expand their customer base. It is a suitable method for virtual environments. For physical environments, customer experience managers will need to look for alternative solutions that are not easily scalable and cost-effective. Finally, the effective pitch involves the preparation of sales arguments that produce the expected results. CX teams can use tools such as Business Model Canvas or MVP (Minimum Value Product) to create compelling sales arguments and also increase the prototype escalation rate (Voorhees et al, 2017).

6. FINAL CONSIDERATIONS

Experimental marketing strategies have been developed by organizations with the objective of attracting the customer to interact and engage with the offers and, more specifically, to make them have proactive and favorable attitudes, through direct interactions with the organization, as well as indirect, through intermediaries. These interactions can be organized into pre-consumption, consumption and post-consumption stages. In fact, customer experience covers a psychological construct that seeks a holistic and subjective attitude, resulting from customer contact with the organization through different channels, seeking to obtain customer engagement (Gentile, Spiller & Noci, 2007; Pine & Gilmore, 1999). These interactions with customers aim to provide six categories of responses that structure the customer experience: sensory and physical, emotional and affective, cognitive, pragmatic, lifestyle and relational (Schmitt, 1999; 2003). Consequently, interactions and engagements accumulate knowledge, value and perceived quality of the customer at each stage of the experience process, resulting in the possibility for customers to establish an emotional connection with the offers (Meyer & Schwager, 2007).

Therefore, an experience is nothing more than attractiveness designed to stimulate a given emotion in the consumer. Once activated, this emotion can be the guiding principle of consumption that will drive the mood of the moment, aiming to promote consumption associated with an emotion experienced in the past. Shaw & Ivens (2002) list seven considerations that must be incorporated into the construction of consumer experiences: (i) it must be a source of long-term competitive advantage: the focus is on retain the customer for future gains; (ii) it must be created to continually exceed the physical and emotional expectations of customers: the idea is not to focus on physical aspects, but emotional ones; (iii) it must be differentiating, and focused on stimulating

planned emotions: that is, it must plan exactly what it is intended to evoke; (iv) it is possible from an inspiring leadership, an empowerment culture and empathetic people who feel happy and fulfilled: endomarketing and endobranding are critical; (v) it must be designed from the “outside in”, instead of from the “inside out”: the consumer must be the center of the company's attention; (vi) it must be profitable, and able to significantly reduce costs, in order to make the experiments economically viable; (vii) it should focus on personifying the brand: which involves building trust with customers.

Examining the literature on the subject of customer experience, the absence is noted, of a structured, detailed and systematic framework to guide managers and CX teams in the design of the main drivers of customer value. In this study, five models were outlined, but one of them addresses the perspective of lean startup or agile methodologies, that is, focusing on tests and scales. This theoretical trial describes eight drivers of customer value delivery that must be included a customer experience project: speed, convenience, risk, flexibility, relationship, information, costs and emotion and comfort. It is also worth mentioning the five stages that were presented and described based on lean startup principles: (i) conducting immersive field research in order to understand the challenges of the customer experience project; (ii) idealizing and generating solutions to the challenges through the research carried out; (iii) designing and executing small-scale prototypes that improve upon interactions with customers; (iv) measuring the results of the prototypes and then deciding on the stimulus; (v) and scaling successful prototypes, according to customers. Thus, the manager's role involves providing and driving value experiences for customers, in keeping with the benefits that will be provided to the company.

Meanwhile, the conception, design and implementation of customer experience projects involves the adoption of a customer experience culture, which, in turn, means implementing a customer-centered – or human-centered – orientation (Pine & Gilmore, 1999). It is not enough simply to have customer experience ideas and prototypes if customer focus is not a vital element of the organizational culture. This includes strategies, team organizational structure, qualifications, spirit, etc. (Berry & Carbone, 2007). A customer experience culture can comprise initiatives: strategic CX, integrating customer experience with leadership, making customer experience visible, integrating customer experience with training, connecting customer experience with performance management, integrating customer experience principles at work, building customer experience platforms, and allocating budgets to manage customer experience projects (Verhoef et al, 2009). Therefore, the organization needs to create a customer experience mindset, with processes, budgets, tangible and measurable performance metrics and integration between areas of the organization, led by cross-functional teams.

The aim of this study is to present, build and discuss the five stages of delivering value and experiences through a framework that can support CX professionals in organizations. Therefore, in terms of proposals for future study related to the customer experience theme, there are two may require a certain level of dedication on the part of researchers: one is the application of this framework in the design of customer experience projects and, consequently, analyzing and evaluating the challenges in order to promote adjustments and improvement of the model; and the other is the impact of a culture that is focused (or not) on the customer in the process of designing and building value projects and customer experience. As for study limitations, this trial does not involve empirical research, but is only a theoretical study intended to present, debate and discuss the stages of construction of a customer experience project, through contemporary techniques, practices and tools, with the aim of contributing to the business area, in particular marketing, services and innovation.

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