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# Forrester Advisory On Envisioning The Customer Experience Journey

## Introduction

Most firms' ambition is to be the customer experience leader in their industry or a leader across all industries. To achieve this weighty objective, they need to begin with a shared understanding of the future customer experience they want to deliver, formalized in a customer experience vision and strategy, so that all employees are working toward the same aspirational goal.

In this workshop, Forrester will help you develop and define the vision for your intended customer experience. We will achieve this by identifying target customers and their needs and perceptions; determining how these customers view their experience with your organization today; and brainstorming gaps in your current experience as well as future experiences that will resonate with customers. This engagement will result in a single vision that will act as the North Star for your company's actions, decisions, and investments to improve its customer experience.

## Session Approach

Through Forrester's advisory engagement, you will receive critical guidance on the opportunity and future state of customer experience. Forrester's approach will consist of the following:

- › **Lead a preparation call.** Forrester will lead one 30-minute meeting via teleconference to define session objectives, gain further understanding of your current direction and organization, and finalize the agenda.
- › **Review relevant client materials.** Forrester will review up to 30 pages of relevant corporate strategy; brand strategy; digital strategy; and customer segmentation, persona, or journey map work relevant to the engagement.
- › **Prepare the content.** Forrester will aggregate existing research, data, and analyst expertise to develop a tailored facilitated session.
- › **Conduct the session.** Forrester will lead and facilitate a one-day onsite workshop to identify target customers and develop a vision for the intended customer experience.

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## Typical Session Agenda

9:00-9:30 a.m.	<b>Welcome and introductions</b>
9:30-10:15 a.m.	<b>Presentation: How to build a customer experience strategy that works.</b> Forrester will describe the traits of an effective CX vision and strategy, share examples from best-in-class companies, and define the process for creating a vision and strategy
10:15-10:30 a.m.	<b>BREAK</b>
10:30-11:00 a.m.	<b>Activity: Definition of target customers.</b> Forrester will lead an assessment of “best fit” customers, and groups will create descriptions of these customers. We will then lay out their perceptions, needs, and behaviors as relevant inputs to the CX vision.
11:00 a.m.-12:00 p.m.	<b>Activity: Review of current-state experience.</b> Once groups have identified target customers, they will explore these customers’ current experience with the organization across the phases of the customer life cycle, using previously collected feedback and insights.
12:00-1:00 p.m.	<b>LUNCH</b>
1:00-2:00 p.m.	<b>Activity: Identify gaps in customer experience.</b> Building off the prior exercises, Forrester will lead small groups in identifying pain points and gaps in the current customer experience. Specifically, we will: 1) look for missing opportunities to meet customers’ needs and 2) brainstorm future experiences that will resonate with target customers.
2:00-2:30 p.m.	<b>Activity: Developing customer experience themes.</b> Each group will then organize their ideas into themes that encapsulate future customer experience opportunities.
2:30-2:45 p.m.	<b>BREAK</b>
2:45-3:30 p.m.	<b>Activity: Define the intended customer experience.</b> Finally, groups will summarize the intended customer experience in vision statements, share them across groups, and discuss how they align to brand attributes and the larger corporate strategy.
3:30-4:00 p.m.	<b>Wrap-up and Q&amp;A</b>