



The Moments of Truth Tool Kit

Version 1.0

International Process and Performance Institute

Purpose of the Moments of Truth Tool Kit

The purpose of the **Moments of Truth Tool Kit** is to give you an actionable approach to making Customer Satisfaction work in your favor... to recast it as a positive, enabling effect rather than a negative, revenue-stealing one.

Customers.

They are the heart and soul of every business. We spend enormous amounts of time, money and energy to better serve our customers.

Yet even following our best efforts, instead of making the customer experience better, it often gets worse!

And if we aren't making it worse, at the very least we are making that customer experience unpredictable.

But what do our customers want? They want a predictable and satisfactory experience. They want us to meet their expectations each and every time they interact with us. They want us to do the work and then they want to get on with their lives.

So why does the customer satisfaction and experience inconsistency problem exist? If the customer doesn't want that and we don't want it either, then where is the disconnect happening?

Certainly creating and propagating the problem is not our intent. Our intent is just the opposite. The problem isn't how much effort we are putting out. We put out a lot of effort in connection with our customers and in improving the experience they have with us.

The problem is in how we are trying to improve the customer experience.

We are using the wrong tools, the wrong approach, even the wrong thinking and that is hitting us where it hurts... right on the bottom line.

Where Customer Dissatisfaction comes from and How to Stop it Dead in its Tracks

How pervasive is this condition? Even the best product and finest service companies are losing customers everyday for lack of a simple understanding – the effect that Moments of Truth have on their customers.

Everyday customers touch your business... and leave dissatisfied. In most cases it's not your product, your price, your selections or even your service. It's something far more insidious, and it's taking revenue away from you every single day – but it doesn't have to.

It's the customer experience and it's not what you think it is nor is it what you want it to be. In fact, while you probably think your customer experience is solid, cohesive, reliable and predictable, the truth is it's more like swiss cheese – riddled with holes.

Those holes are called Moments of Truth and they affect your customers profoundly. They determine the experience of the customer and they dictate the degree of consistency – or inconsistency – of the experience you deliver. For most organizations they are a continual drain on resources and the number one reason for customer attrition.

The good news is that Moments of Truth are actually quite easy to identify; we only have to look for them. This Toolkit will show you how.

The other good news is that there are two direct actions you can take to make an immediate impact on stemming the tide of customer dissatisfaction.

Once we have learned how to identify Moments of Truth, the immediate action we can take is to look at what we have identified and challenge them. We do this by asking two simple questions:

Do our “processes” really need all of these Moments of Truth in them?
Are there some Moments of Truth that we can immediately eliminate by taking one or more simple actions?

Are there ways we can improve Moments of Truth if they can't be immediately eliminated? What could we do to lessen the potential negative impact on our customers from them?

Chances are you will find many Moments of Truth that you can eliminate or improve immediately.

Understanding and Identifying Moments of Truth

What are Moments of Truth?

Anytime a customer comes into contact with any aspect of the business, however remote, there exists a Moment of Truth. There are five main types of Moments of Truth:

1. person to person
2. person to system
3. system to person
4. system to system
5. and person to product

(This last category may involve the direct interaction with a piece of machinery, say a vacuum cleaner or a car.)

Any contact with the Customer is a 'Moment of Truth' in so far as we have the opportunity to create a moment of magic, or conversely, a moment of misery.

Moments of Truth first really came onto the management radar screen in the early 1980's due to Jan Carlzon's noted leadership efforts in "turning around" several large European airlines, most notably SAS, where within a year of his taking over the CEO position SAS was back in the black and earned a reputation as one of the world's best airlines. He accomplished this through a basic management of Moments of Truth.

Carlzon has spelled out his management and staff motivation philosophies in a best-selling book, Moments of Truth, which has since been translated into 18 languages.

Where do Moments of Truth occur? Everywhere. Examples of where Moments of Truth occur include:

Respond to a query
For scheduling purposes
To make a confirmation
As an information service
For our marketing purposes
To solicit information

For security reasons
To make a purchase
To change something
To service or repair something
To request an action be taken
From services provided by partners

The Five Step Plan to Immediately Improve Customer Satisfaction

What do you need to know to put this strategy to work for you? It's simple. You are only five steps away from immediately improving the experience of your customers! You need to have a goal, a target, MOT identification, a blink analysis and your actions.

The Five Steps to Improving Customer Satisfaction

Identify your Goal

Of course the overall goal is to improve customer satisfaction. But to achieve that goal we need to know what role we are acting within. This helps us know if we are educating, leading, directing or doing.

Describe your Target

The target is the "area" we are seeking to improve. Most often this would be thought of in terms of a "process" but there is no restriction on how we define the target areas we are working on.

Identify Moments of Truth

For the target area, all of the Moments of Truth that exist need to be identified. They also need to be described well enough that what was meant is easily recognizable to others or when we come back to our work at a later date.

"Blink" your Analysis

Judging the impact of Moments of Truth on Customer Satisfaction is a very subjective thing. It's relatively easy for people to do, but very difficult to codify. It can best be done by looking at the Goal, the Target and the Moments of Truth all together. In most cases the Moments of Truth that are problematic will immediately become obvious.

Describe your Actions

Describing your actions is the way you build the direction, leadership vision or specific activities that need to be done for improvement to take place. Depending on what your Goal is, your Actions need to take the form that will help get the work you know needs doing, done.

Step 1 - The Goal

It's important to have a goal. If we don't have a goal then it's very hard to play the game to win! So in your MOT Plan you need a goal.

What is your goal?

While Improving Customer Satisfaction is the overall goal, the specific goals for people to help us achieve that are what is needed to get results.

Those specific goals could be several things depending on who you are and what you do. Let's look at some examples and see how they change the nature of the MOT Plan goal.

Leadership Goals

Leaders

Perhaps you are a manager or executive. What you need to do is provide leadership and direction. You need to get people moving in the right direction. Is this a reasonable goal? You bet it is!

Giving people clear direction on how they can deliver against the organization's goals is very important. Anytime you can concisely drive people into activities that directly support your goals the results will speak for themselves. So for leaders, the goal is:

Focus people on addressing the causes of Customer Dissatisfaction.

Managerial Goals

What if you have managerial or improvement results responsibility and accountability? Now you need people to address those issues that will create a direct and immediate positive impact on Customer Satisfaction.

Accountable Professionals

Accountable professionals have organizational metrics that are used to assess their performance. They have responsibility for delivering on organizational vision or mandates in a specific area of the company. Their goal is to focus activities on both the right places and the right actions.

Identify target areas for Customer Experience Improvement and determine Actions to be taken.

Work Goals

Some of us have a more direct responsibility. We are tasked with being the person who leads or does the work of improving the Customer Experience.

Process Professionals (business/IT)

Process professionals come from both business and IT roles. They have responsibility for selecting the “right thing to do” and then to “get it done.” Their goal is to zero in on the specific things that need to change and then craft the nature of that change!

Identify Actions to be taken and the specific intended outcome for each.

Possible Goals

So the goals could be:

Focus people on addressing the causes of Customer Dissatisfaction.

- This would be a Leadership Goal.

Identify target areas for Customer Experience Improvement and determine Actions to be taken.

- This would be a Managerial Goal.

Identify Actions to be taken and the specific intended outcome for each.

- This would be a Work Goal.

Or they may be your own interpretation of one of these.

But before you can make something good happen, you have to know what your goal is – and if the goal relies on others doing something - you have to give them clarity on what you expect from them (what their goal is) in order for them to produce the results you desire.

Step 2 – The Target Area

It may be preferable to identify your Target Area first, that's up to you. But you need a target area because we need to know exactly what we are talking about when we are ready to make an improvement in the Customer Experience we deliver.

What is our Target Area? For many people it will be some kind of a "process." Now we use that term loosely so don't get hung up on the definition of what a process is. For our purposes a process is anything that helps us communicate to others the understanding of what part of the business we are talking about! If you don't like using the term "process" then don't. It's only meant as an aid, not a requirement.

However we think about our target area, we need to get it defined. Some of the ways we might go about getting it defined are:

- 1) By the end-to-end customer experience
- 2) By product
- 3) By department
- 4) By research (problem areas)
- 5) By target customer

What's important in this definition is the ability for others to know what you're referring to – in fact, it's absolutely critical!

So describe the target area in terms the people in your organization can understand and relate to.

Make sure there is a commonly shared understanding of what you mean by your target area or you'll put the train on the wrong track and waste a lot of time, effort and money without achieving your intended goal.

Step 3 – Identify Moments of Truth

For the target area, identify each of the Moments of Truth that exist within it; then record them in a descriptive enough way that others (and you if you come back later) will immediately know what you mean.

Note – if you start having trouble here because of different ways people could interact with your organization in your target area, then you need to narrow down your target area and/or your goal! This indicates you’ve either selected an area that is not well defined or you’ve identified a goal that is not clear enough to directly action.

This may also mean the target area you started with becomes multiple target areas. If this is the case you may need to be more descriptive in your Target Area description, adding something on to it like “when the customer calls in to get technical support” as compared to “when the customer calls in.”

Make sure you follow the instructions we’ve provided in identifying all of the Moments of Truth in the target area. Getting this right will play a very big part in determining the degree of benefit achieved.

Also, make sure you write them in a descriptive enough way that you can come back a day, a week or a month later and know what each Moment of Truth is...

You’ll be tempted to shortcut this – but DON’T.

Step 4 – Do the Blink Analysis

Moments of Truth are interactions with the Customer. That's something we can all identify with because in our everyday lives we are all customers!

So as "THE CUSTOMER" in this experience, what raises the hair on the back of your neck? What triggers a negative response? What do you instinctively shy away from? Which of these Moments of Truth do you KNOW just shouldn't be there?

Chances are you will find a number of these situations with the Moments of Truth for any experience you look at. It's that simple. Don't make it harder than it needs to be.

If you have trouble with this then you need to role-play the Moments of Truth. When you role-play, you're now the customer. Take each of the Moments of Truth one at a time and picture yourself as the customer. What is likely to happen? Is this what you would like to experience as the customer? What could go wrong? Or better, from your own experience as a customer, *what is likely to go wrong?*

If you get into the role-play as the customer you'll quickly realize where the customer experience is likely to be compromised. The more likely a Moment of Truth is to compromise the customer experience the more important it is to remove it.

For the Blink Analysis what we want to accomplish is to rank the importance of these Moments of Truth in a way that helps us know the ones we need to take action on.

Here are a couple of ways you can rank Moments of Truth.

Likelihood of Customer Dissatisfaction occurring

Very Likely
Likely
Not Likely

Relative Importance in Improving

Absolutely Necessary
Important
Not necessary

This analysis shouldn't take you long at all. It should be quite obvious once you have identified the Moments of Truth what is getting in the way of increasing Customer Satisfaction.

Step 5 – Describe your Actions

Based on the answers you found for the preceding questions you are now ready to craft the Actions that should be taken to best improve the Customer Experience the company delivers. The actions will vary based on how you are using this kit. Here are some examples:

Possible Actions:

- 1) Eliminate this Moment of Truth
- 2) Focus activities on these Moments of Truth as a way of achieving better Customer Satisfaction
- 3) Identify how the issues with this Moment of Truth are going to be dealt with
- 4) Take {some action} to eliminate this Moment of Truth
- 5) Prioritize your activities, resources and work allocations to align with addressing these Moments of Truth
- 6) Change your process to eliminate as many Moments of Truth as possible

This gives you an idea of what the Actions may be that you identify. You may choose to word your actions differently. That's fine, as long as the end result is that actions that should be taken – are taken.

It's not hard. It's not rocket science.

Make sure you use the template we have provided and fill in all of the blanks.

In most cases it's important to use all five steps we have presented here. It won't take you long but it will get you immediately focused on doing things that directly improve the Customer Experience.

Oh, and it will also *reduce the amount of non value-added work being done by the people in your organization.*

The Moments of Truth Tool Kit Template

Identify your Goal -

Identify your Target Area -

Identify the Moments of Truth in the Target Area -

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	

Do Your Blink Analysis – (make notes about that)

Identify your Actions –

1	
2	
3	
4	
5	
6	
7	
8	

Describe your results – (optional: useful for Success Stories and validation)
