

Business Case Bites

25 January 2018

Customer Design Principles

WHAT IT IS

This bite aims to assist practitioners in understanding what customer centricity means and how it can be used from the very start of the business case process.

Customer Design Principles have commonly been used in the development of services (especially digital) but are generally suitable for all development processes.

WHY USE IT

Many business cases follow traditional development methods and then seek to 'bolt on' the customer thinking at the end. Even those that start with a well-articulated 'customer issue' can lose sight of this as the business case is developed meaning that the ultimate solution doesn't fully address the need.

Not only should business cases have a strong customer insight from the beginning for a robust investment case, but it is also now a main focus of the NZ Transport Agency.

HOW IT'S APPLIED

The following ten key principles are useful as guidelines even at a headline level, but each can be explored further by using the suggested test questions and success criteria. Each principle is supported by example tools which can be used to test thinking and give reassurance that the customer is at the heart of the business case process.

They should be used during strategy development to ensure our planning is problem focused and customer centric. They should be used during the project start-up phase to become a part of the decision making process. They should continue to be used during planning, prioritisation, and when evaluating work programmes.

FURTHER INFORMATION

Information will be added to our website soon.

In the meantime, contact [Mark McCann](#) from the Customer Experience and Behaviour team.

10 key principles

01

START WITH NEEDS

02

UNDERSTAND CONTEXT

03

DO LESS

04

DESIGN WITH DATA

05

CREATE SERVICES

06

DO THE WORK TO MAKE IT SIMPLE

07

BUILD FOR INCLUSION

08

ITERATE, THEN ITERATE AGAIN

09

BE CONSISTENT, NOT UNIFORM

10

MAKE THINGS OPEN: IT MAKES THINGS BETTER



Design Principles	What do we mean	Example Questions to test thinking	What is success	Example tools to support effort & understanding
01 START WITH NEEDS	<p>These are customer needs not governments needs.</p> <p>Design starts with identifying user needs. If you don't know what the user needs are, you won't design or create the right thing. Do research, analyse data, talk to users. Don't make assumptions. Have empathy for users, and remember that what they ask for isn't always what they need.</p>	<ul style="list-style-type: none"> Who are you solving this for? What is important to them? What are the conflicts/polarities/similarities in their needs 	<ul style="list-style-type: none"> How does the design/service/solution address the actual needs What is the experience we are trying to create 	<ul style="list-style-type: none"> Stakeholder mapping/ toolkit Success statements Problem Analysis
02 UNDERSTAND CONTEXT	<p>We're not designing for things, we're designing for people. We need to think hard about the context in which they're using our services, and the opportunities that are potentially unlocked if we understand this well.</p>	<ul style="list-style-type: none"> Why are people using our services? What (else) is going on for them? What is the problem we are trying to solve Why is this important? 	<ul style="list-style-type: none"> We understand the bigger picture We understand the role we play, and the opportunity for others We recognise that the customer experience is usually not contained wholly within our responsibilities. We show empathy for our partners about what they are also trying to achieve and create a better more joined up service. 	<ul style="list-style-type: none"> Systems thinking tools Behavioural insights Agency(s) connecting the dots for citizens
03 DO LESS	<p>If we've found a way of doing something that works, we should make it reusable and shareable instead of reinventing the wheel every time.</p>	<ul style="list-style-type: none"> What do we already know? Who already plays in this area? Is this something only we can do? What is our role and value (vs the role and value of others?) 	<ul style="list-style-type: none"> Collaborate with external influencers We have delivered value with others We have copied and leveraged to build on the ideas of others We have enabled others to play We have accepted we don't have all the answers. 	<ul style="list-style-type: none"> Stakeholder toolkit Legal and commercial framework
04 DESIGN WITH DATA	<p>We need to move beyond understanding what people do, to why people do it. We need to act on data, not hunches, but this data is beyond just retrospective, rational, high volume data that we can easily collect. It's about joining existing data with customer insight and understanding to test our assumptions and hypotheses about how the world really works.</p>	<ul style="list-style-type: none"> What do we already know? What are the assumptions we need to be test? What are the possibilities that we can explore? What are the insights to be gained about why and how people are/ will interact with the service? 	<ul style="list-style-type: none"> Assumptions have been tested with customers Using qualitative and quantitative research Reduced rework Projects initiated on customer need Improved usability and uptake 	<ul style="list-style-type: none"> Customer journey maps Interview techniques Data analytics Behavioural insights overview
05 CREATE SERVICES	<p>We always think beyond the current interaction. It's about understanding the whole customer journey, not just the bit they need from us. By thinking about things as a service, you think about the experience of those that are choosing to use it. This helps us move from focusing on solutions to being clear about the problem or need.</p>	<ul style="list-style-type: none"> What is the customer trying to do, and why? What the options? How do you know what's important to them? 	<ul style="list-style-type: none"> Connecting opportunities Ecosystem thinking, potentially new players and partners. New or different ways of thinking and working More time up front, less time on solutioning Voice of the customer drives conversations 	<ul style="list-style-type: none"> Customer journey mapping Service Blueprint Insight methodology
06 DO THE WORK TO MAKE IT SIMPLE	<p>If things are easy, they are more likely to be used or done. We need to ensure that we don't create opt-out or unnecessary process to make it simple for us, by making the customer do all the work instead.</p>	<ul style="list-style-type: none"> Are we clear about what we are expecting of the customer and why? Is it more or less than what is currently required? If it is more, why, and what can we remove to make it simple 	<ul style="list-style-type: none"> Customers agree that it is simple Don't take "It's always been that way" for an answer 	<ul style="list-style-type: none"> The 5 "why's"
07 BUILD FOR INCLUSION	<p>Everything we build should be as inclusive, legible and readable as possible. We're building for needs, not audiences. We're designing for the whole country, not just the ones we usually talk to. The people who most need our services are often the people who find them hardest to use. Let's think about those people from the start.</p>	<ul style="list-style-type: none"> What barriers exist that make it difficult or impossible for people or groups to use the service? What perverse impacts or drivers are created on other groups of people from this design? 	<ul style="list-style-type: none"> Make our services as accessible as possible; to exclude no one. Aim for mass customisation to increase feelings of inclusion and empathy. We don't build for the "average". If you design for average, you design for no-one. 	<ul style="list-style-type: none"> Personas & User cases Success statements Joined-up services (single identifier logon) Customer journey mapping Create project principles?
08 ITERATE, THEN ITERATE AGAIN	<p>The best way to build good services is to start small and iterate wildly. Release Minimum Viable Products early, test them with actual users, delete things that don't work and make refinements based on feedback. Iteration reduces risk. It makes big failures unlikely and turns small failures into lessons. If a prototype isn't working, don't be afraid to scrap it and start again.</p>	<ul style="list-style-type: none"> What have you let go of?(If you haven't, then you are not iterating) What have you learned? How are you embedding your learnings into the next stage of the project/ process? 	<ul style="list-style-type: none"> Strong culture of testing and challenging ideas throughout the process Examples of failing fast and letting things go where they show that they are not delivering to the needs and objectives of customers and the business 	<ul style="list-style-type: none"> Prototyping tools User testing Interview techniques
09 BE CONSISTENT, NOT UNIFORM	<p>We want to create consistent experiences, not one size fits all approaches. How this is achieved is determined by the customer, and constrained only by the principles.</p>	<ul style="list-style-type: none"> How does the design/service/ solution address the actual needs? What is the experience we are trying to create? Who for? 	<ul style="list-style-type: none"> Consistent (not the same) experience, tailored to needs Not a one-size-fits all 	<ul style="list-style-type: none"> Case studies Guidelines
10 MAKE THINGS OPEN: IT MAKES THINGS BETTER	<p>We don't operate in a vacuum. Our customers are the same customers as others, and the problems we face are not unique. How do we join up and share the learnings and insights so we can build on each others experiences and not reinvent the wheel or create confusion and complexity.</p>	<ul style="list-style-type: none"> Who else is doing this? What can we learn/leverage? What can we share? 	<ul style="list-style-type: none"> Different conversations with different people. Collaboration and sharing is occurring intra and extra Agency DNA of our work is visible and leveraged by others 	<ul style="list-style-type: none"> Organisationally - redefining success. Success encompasses reputation elements about thinking and acting in a different way. Mechanism or platform for sharing ideas (incentives as well)