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Developing a Customer Care Operating Model for a Company in Service Business

Engineering Services Delivered as Projects

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When I started my studies nine months ago, I knew that there will be a tough journey ahead. But I didn’t know that it would also be wonderful at the same time. The combination of a full day job, taking care of a one-year old boy, preparing for our wedding, and master’s thesis studies put me and my family to the test. Now that I am writing this text, I am happy that the studies are done and everything went well, after all. In parallel, I am also working on my speech for my wife at our wedding and looking backwards at our journey together along the years. I can identify similar characteristics in the journeys of two lovers and the master’s studies. In both journeys, the destination or the journey itself are not most important part as one might guess. Instead, in the lovers’ journey the travellers need support from each other during the journey, and in the master’s study even from many other people to reach the destination. Therefore, the most important part of the journey are the people who support the traveller.

My journey to a graduate from the master’s studies was amazing because I got a lot of support, and I want to thank everyone who were involved in the process. I want to thank the case company for the opportunity for making this thesis, and every participant from my employer company who were involved. First, I want to thank my company instructor who supported me throughout the thesis and was always available for my questions and needs for guidance. Secondly, I want to thank all the interviewee participants and key stakeholders who gave valuable insight to my study, but also, I want to thank the steering group that participated in developing the outcome of my thesis. Additionally, I had amazing professors guiding me to correct direction, and giving insightful knowledge on how to proceed when in doubt. The Metropolia faculty and all colleague students were great support also, thank you for that. Additionally, my family was the most critical element during my studies, and I want to thank them for being always available for me, and supporting me during the entire journey, this would have not been possible without you.

Mika Vinho
Espoo
April 25, 2019
Abstract

The thesis focuses on developing a customer care operating model for a company in service business with the focus of one service context; the engineering services delivered as projects. The purpose is to have better understanding on how the company should take care of its customers in general, and to build the basis for further development of defining the customer care processes in more detail. Any company that is in the service business and aims for increased growth needs to take care of their customers, therefore a systematic way of taking care of the customer that aims for increased positive word of mouth and loyalty is required.

The study is based on three data collection rounds that included case company internal interviews and documentation, but also key customer interview and key stakeholder workshops. The thesis is conducted by first looking for existing knowledge from literature, then conducting a current state analysis for primary research, and continuing with the acquired data to conducting workshops together with case company key stakeholders that focus on creating a solution to the business problem, and finally validating the solution with different functional levels within the case organization.

The results of the study indicate that customer care is mainly related to three categories of activities: the proactive activities, the reactive activities and the voice of the customer. The proactive activities aim to ensure execution, quality, communication and partnership, but also business development during an end-to-end customer journey in a way that negative customer experiences are avoided. The reactive activities are required for situations where the customer has questions or problems that need to be solved. Additionally, the voice of the customer is required for collecting, processing and utilizing customer data, but also operational internal KPI’s to support decision making on how any issues can be proactively avoided, or where to focus on improvement initiatives.

A customer care operating models usually exist in every successful company; however, they may be implicit. The thesis delivers a proposal for taking care of customers, but also tools are introduced for continuing the work in other contexts. Together with the thesis outcome and employee training, the case company can start to take care of the company customers systematically to achieve increased positive word of mouth, and customer loyalty, and thereby, the customers spread more positive word-of-mouth and return to the service provider for more services which can lead to increased growth.

Keywords

Customer Care, Operating Model, Customer Journey
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1 Introduction

This study explores customer care in a mid-size company which operates in the service business. The Thesis focuses on ideas for excellent customer care and the basics of building operating models. With this focus, the Thesis builds an operating model through which customer satisfaction and loyalty can be increased.

In recent business practice, significance of taking care of company’s customers is constantly growing in order to increase customer satisfaction and loyalty. When a customer is happy with the service, they spread positive word-of-mouth and return to the service provider for more services. It is proven fact that loyal customers and continuous revenue correlate directly in service companies. Therefore, a customer care operating model is needed in order to improve customer care processes. This Thesis tackles this important issue.

1.1 Business Context

The case company is a service company in the manufacturing industry. The service areas include design engineering services, software and embedded system services, and technical documentation services. The company has over 3000 employees operating globally.

Each of the case company services can be delivered as consulting service, as projects or as continuous services. The focus of the proposed customer care operating model is on the projects service delivery model. The projects service delivery model is a part of the case company’s managed services, and the case company aims to increase the revenue in managed services, therefore this focus is chosen.

1.2 Business Challenge, Objective and Outcome

The competition is increasing in the service business, and the customers value good experiences in addition to value added. Currently, the customer satisfaction is measured, and it also guides the company’s direction. The company focus is on increasing the customer satisfaction and this can be done by taking care of the customers even better.
The company, however, has recognized a lack of properly documented and visualized customer care processes and a lack of clearly defined operating model. This is perceived as an improvement opportunity in customer care. Therefore, a clear guideline for customer care operation is needed at the company. Presently, the company management system describes four core processes, which are sales process, service delivery process, key account management process, and customer care process. The business challenge is, that out of these four, the Customer care process still needs to be developed. In order to define the customer care process, a more generic Customer care operating model needs to be created first.

Accordingly, the objective is to propose a Customer care operating model within the context of one service, but which can be extended to other service contexts as well. The outcome of the study is a Customer care operating model.

It is assumed that the company has many implicit customer care processes. However, a properly defined and documented visualization of the Customer care operating model is currently missing, therefore it is so far challenging to get a clear guideline about how to take care of the company’s customers.

1.3 Thesis Outline

The scope of this thesis relates to providing a general level operating model with required elements and looking at the big picture of how a company should operate, instead of focusing much on detail in a one specific element. Also, selecting one service context means that the study focuses on one key customer and a one service delivery model.

The thesis is conducted by first looking for existing knowledge from literature, then conducting a current state analysis for primary research, and continuing with the acquired data conducting a workshop that focuses on creating a solution to the business problem, and finally validating the solution with different functional levels within the case organization.

The thesis is divided into seven sections. Section 1 is an introduction. Section 2 is introducing the methods and materials used in the thesis. Section 3 describes the existing knowledge from literature. Section 4 continues with the current state analysis, in which the findings of interviews, documents and survey results are categorized and analyzed,
and the customer journeys are mapped. Section 5 describes development of customer journeys and the co-creation of the customer care operating model for one service context in workshops. Section 6 describes the validation stage of the initial customer care operating model and shows the final proposal for customer care operating model. Section 7 summarizes the thesis, gives recommendations for further development and evaluates the credibility of the thesis.
2 Method and Material

This section describes the research approach, data collection and analysis methods.

2.1 Research Approach

Basic research relates to understanding theoretically business processes and their outcomes, and not giving much attention to the practical applications of the theory. When this research starts to address the practical issues that can be used for creating solutions for a business problem, the research is called applied research. (Saunders et al 2009:8).

Research strategies can be divided into qualitative and quantitative research. (Kananen 2013:28). The qualitative research tries to understand the research object phenomenon, and its structure, including all factors and the interrelationship between them. Qualitative research is typically used in situations where there are little existing information and theories on the research object, and a deeper understanding is required about it. Qualitative research is also used for creating theories, or when a description of a phenomenon is required. Qualitative research means research that looks for answers without statistical methods, instead it uses words and sentences. On the other hand, quantitative research requires existing phenomenon, theories or models that are understood, and are the subject for research. In addition, in quantitative research, the factors are known before hand to be able to count results. (Kananen 2013: 31-33)

Action research, Case study, and Design research approaches utilize quantitative and qualitative methods, and therefore they are considered as approaches, rather than methodologies (Kananen 2013:28). There are differences between these three approaches, the case research means understanding a phenomenon, whereas the action research means intervention and change (Kananen 2013:29). The design research is about changing a phenomenon (Kananen 2013:29). Case research means that there are one or more cases to be studied (Kananen 2013:37), with learning from the case(s) as the main goal for the researcher. Action research aims to change the phenomenon studied, and for the researcher to participate in the change (Kananen 2013:41). Design research is similar to action research, the difference is that in action research the researcher him/herself participates in the development operations, whereas the Design research does not require participation (Kananen 2013: 41-45).
Design research combines two factors: development and research. Design research itself is not a methodology of research, however, it is using other research methodologies which focus on situation or an objective for development (Kananen 2013:28). Design research can utilize both quantitative and qualitative methods (Kananen 2013:28). Typical objective for Design research can be a development work in an organization. The objective may include processes, products, services or situations. In addition to solve a problem or develop an objective, the purpose is to change the object with relevant means. (Kananen 2013:20-22)

Accordingly, the research approach selected for this thesis is Design research, due to the fact that the research addresses a practical business problem and focuses on change by developing a solution to the business problem. Design research approach is chosen because a practical business challenge needs to be developed, and in order to do that, some research must be conducted to have the base for development established. In this thesis, the methods are mainly qualitative, including multiple data collection techniques, such as interviews, documents and surveys. Qualitative method was chosen because there is no existing theory to improve, instead a deeper understanding of the phenomenon is required. In addition, a new description of a phenomenon is required, and for that qualitative methods are best suited.

2.2 Research Design

The research design of this Thesis is illustrated in Figure 1.
As Figure 1 shows, the Thesis starts with searching ideas on creating a customer care operating model from literature. The focus is on basics of building operating models and finding ideas on excellent customer care, as well as mapping customer experiences and touchpoints. The outcome of the first phase is a framework and tools for mapping the customer experiences and creating customer care operating models.

After the framework is created, the thesis continues with the case company current state analysis where a description of the current customer care operating models and the customer journeys with touchpoints are mapped and analyzed. In addition, the analysis of the strength and weaknesses is made, and the ambition level of company’s customer care is identified. The outcome of the second phase of the project is a summary of current customer care model’s strengths and weaknesses, summary of critical factors leading to positive or negative experiences during a customer journey, and identified ambition level in terms of customer care.

After that, the thesis continues with the creation of customer care operating model. In this phase, the customer care operating model is co-created with the company stakeholders. The outcome of this phase is a summary of customer care operating model’s first version. The fourth and last phase of the project is feedback and validation of the
proposed customer care operating model. In this stage of the project, the first version of the customer care operating model is shown to key stakeholders within the organization, and improvement proposals and feedback are looked for. The outcome of the final stage is the final version of the customer care operating model.

2.3 Data Collection and Analysis

The data used in this study is collected from multiple data sources with several data collection rounds. Table 1 below describes the important data sources used in this study.

Table 1. Details of interviews, workshops and discussions in Data stages 1-3.

<table>
<thead>
<tr>
<th>Participants / role</th>
<th>Data type</th>
<th>Topic, description</th>
<th>Date, length</th>
<th>Documented as</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Key Account Manager, Consultancy</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Jan 2019, 1h</td>
<td>Field notes and recording</td>
</tr>
<tr>
<td>2 Sales Director, Consultancy</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Jan 2019, 1h</td>
<td>Field notes and recording</td>
</tr>
<tr>
<td>3 Key Account Manager, Projects</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Feb 2019, 1h</td>
<td>Field notes</td>
</tr>
<tr>
<td>4 Regional Manager, Projects</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Feb 2019, 1h 1min</td>
<td>Field notes and recording</td>
</tr>
<tr>
<td>5 Department Manager, Projects</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Feb 2019, 1h</td>
<td>Field notes</td>
</tr>
<tr>
<td>6 Managing Director, Consultancy</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Feb 2019, 1h</td>
<td>Field notes</td>
</tr>
<tr>
<td>7 Area Manager, Continuous Services</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Feb 2019, 1h</td>
<td>Field notes</td>
</tr>
<tr>
<td>8 Global Solutions Manager, Continuous Services</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Feb 2019, 1h</td>
<td>Field notes</td>
</tr>
<tr>
<td>9 Department Manager, Continuous Services</td>
<td>Skype meeting</td>
<td>Current customer care processes, mapping customer journeys and touchpoints</td>
<td>Feb 2019, 1h</td>
<td>Field notes</td>
</tr>
</tbody>
</table>
As seen from Table 1, data for this project was collected in three rounds. Data 1 collection was conducted for the current state analysis. This round included stakeholder interviews which were recorded and filed noted. The interviews were conducted as skype meetings.

Next, Data 2 collection was conducted to gather development ideas from the customer point of view, but also from the case company stakeholders to co-create the customer care operating model. This data included field notes, and workshop field notes. Finally, Data 3 was collected during the feedback session for the initial proposal from the key stakeholders within the case organization.

In this study, the interviews are the primary method of data collection. The interviews were conducted as semi-structured, skype-meetings that were held online. The questions had been made in advance, and the questions can be found in the Appendix 1. All the company internal interviews were recorded, but the customer interviews and validation were not. Field notes were made for the interviews, see Appendix 1 for the field note template.
Additionally, Data 1 also includes other types of data, such as internal documents and customer survey reports. Table 2 describes the internal documents used in the current state analysis in this study.

Table 2. Internal documents used in the current state analysis, Data 1.

<table>
<thead>
<tr>
<th>Name of the document</th>
<th>Number of pages/other content</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Sales Process Description</td>
<td>21 Pages</td>
<td>Process description</td>
</tr>
<tr>
<td>B Consultancy Process Description</td>
<td>12 Pages</td>
<td>Process description</td>
</tr>
<tr>
<td>C Project Execution Process</td>
<td>20 Pages</td>
<td>Process description</td>
</tr>
<tr>
<td>D Continuous Services Process Description</td>
<td>17 Pages</td>
<td>Process description</td>
</tr>
<tr>
<td>E Key Account Management Process Description</td>
<td>14 Pages</td>
<td>Process description</td>
</tr>
<tr>
<td>F Complaint Handling</td>
<td>2 Pages</td>
<td>Process description</td>
</tr>
<tr>
<td>G Customer Survey Results 2017-2018</td>
<td>96 Rows</td>
<td>NPS survey open questions</td>
</tr>
<tr>
<td>H CRM Contact Data 2018</td>
<td>200 Rows</td>
<td>Customer visit meeting notes</td>
</tr>
<tr>
<td>I Customer feedback and NPS training material</td>
<td>11 Pages</td>
<td>Training material</td>
</tr>
<tr>
<td>J Continuous Improvement</td>
<td>2 Pages</td>
<td>Process description</td>
</tr>
</tbody>
</table>

As Table 2 shows, this study analyzed various internal documents. The main documents included descriptions of the current ways of working at the case company, and the customer survey results. These documents were analyzed for the current state analysis, Data 1, to get an overall understanding how the company is currently operating, and if there are any instructions related to the customer care already existing. In addition, an analysis of customer survey results was done to understand how customers observe the company’s services and operations currently to have an outside-in view. All data were analyzed using Thematic analysis.

The biggest part of data collection and analysis was done for the current state analysis, Section 4, to clarify the current state of the customer care. The relevant literature and best practice on customer care are discussed next.
3 Existing Knowledge and Best Practice on Operating Models for Customer Care from Relevant Literature

This section discusses the available knowledge on building operating models, the tools for excellent customer care, and tools for customer journey mapping. This section starts with the description of building operating models, then continues discussing the elements of excellent customer care, and ends with the concept of tools for customer journey mapping. For building an operating model, the elements of an operating model were identified.

3.1 Basics of Building an Operating Model

In business practice, an operating model connects the company strategy with its operations (Ernst & Young Global Limited, 2018:3). Whereas a business model of a company makes it clear what the company is doing, the operating model responds to questions of how, where and when (Choo, 2017:2). According to Campbell (2017), an operating model provides a clear holistic description of what the organization’s is doing in business and technology, and it focuses on key relationships between business functions, processes and structures that the company needs to achieve its mission.

3.1.1 Elements of an Operating Model

An operating model guides in defining the most critical organizational elements and it typically includes core elements such as design principles, culture, values, governance and processes (Ernst & Young Global Limited, 2018:4-5). Furthermore, a leading practice operating model also typically includes elements such as information technology, organizational structure, risk management, service delivery and performance management. Figure 2 shows a visualization of the elements of an operating model.
Figure 2. Elements of an Operating Model (Ernst & Young Global Limited 2018:4-5).

As seen from Figure 2, an operating model is not meant to be the strategy description, but an operating model helps to enhance the strategy. According to Ernst & Young Global Limited (2018:4-5), an operating model does not need to be the operational instructions, but rather it helps in the creation of them. However, the level of detail of an operating model depends on what the creator wants to achieve with it.

Similarly, Choo (2017) argues that an operating model describes the business functions that are required to keep the company running, such as capabilities, processes, data, people and systems. An operating model is the executional function of the company, whereas the business model is part of the design. Also, according to Choo (2017:2-4), the company success depends on both, the business model and the operating model, since best strategies are unlikely to succeed to deliver value without an operating model.

Furthermore, Campbell (2017) discusses that an operating model helps managers, head of operations, head of human resources, head of property, and the head of IT to do their job in many respects. It can help managers to convert strategy into operational decisions, but also to design and setup the operations. The operating model can also help the head of operations in thinking about the processes that are required for the business to function, as well as the capacity requirements and supply process. It can help the head of human resources to design the organizational structure, and to decide what kind of people is needed in it. The head of property can decide what kind of buildings are required and where they are located. In addition, according to Campbell (2017), the operating
model can help the head of IT to decide the IT architecture that is needed to support the organization.

Additionally, according to Dias et al. (2017), a next generation operating model includes elements such as autonomous and cross functional teams that are anchored to customer journeys and to company’s services. It means that the company needs to reconfigure organizational boundaries and think about the nature of teams in a way that daily operations happen across business lines and market segments. A next generation operating model can also include empowered teams that own the services and customer journeys, and they are allowed to make experiments for improvement. In addition, the model can include ongoing capability building and training for key roles. Furthermore, according to Dias et al. (2017), technology is considered as a core element that supports quick and more flexible services, real time performance management, and KPI dashboards.

Additionally, a target operating model describes the future state of a company’s operations. According to Choo (2017: 4-9), It answers to a question of how a company should be functioning after a new strategy has been created or it has been changed. A target operating model is created from the existing operating model, and therefore it does not yet exist. The target operating model will deliver what the creator wants it to do, however, it is important to design the model for correct outcomes. Choo (2017:4-9) also argues that the mission, goals and objectives need to be aligned with the company’s strategy to assure the wanted outcome.

As seen from these arguments, the earlier presented concepts of an operating model are somewhat aligned with each other, but there are differences. It seems that, depending on the purpose of the operating model, the elements can be chosen differently. However, some core elements seem to be always included, such as processes, organization, information systems and the objective. To be able to choose the elements of an operating model, the operating model needs to be designed. Next section focuses on the design principles of an operating model.

3.1.2 Design Principles of an Operating Model

Creating the operating model correctly is fundamental to deliver value in an organization. According to Blenko & Root (2015:2), there are two pitfalls that a company might take
while developing an operating model. Firstly, the company might fail to evolve its organization to match the new strategy. Secondly, the organizational design might not match the way how the company creates value. To avoid these pitfalls, a blueprint can be drafted on how resources are organized and operated to deliver value. The elements of an operating model, such as structure, accountabilities, governance, behaviors, people, processes, and technology can be integrated to key capabilities by designing them to support company strategy.

According to Blenko & Root (2015:3), the strategic requirements that an operating model needs to support are defined by design principles. Design principles argue how the model supports strategy, and they also ensure that the organization works efficiently. Figure 3 shows a visualization of how design principles are defined for an operating model.

![Figure 3. Design principles for an operating model (Blenko & Root, 2015:3).](image)

As Figure 3 shows, the design principles include the current organizational assessment, the strengths and weaknesses, but also the future strategy and ambition level.

The design principles of an operating model are arguably critical. This step should be considered when developing a new operating model, as it is a good tool for starting the development work.
3.1.3 Operating Model Canvas

An operating model can be a single page document, or it can be a 10-page, or a 100-page document. A one-page operating model is called the operating model canvas (Campbell et al 2017:4, 14-16), which covers the so called back-end of a business model canvas. To understand what the operating model canvas is about, we first need to understand the business model canvas. A business model canvas is shown in Figure 4.

![Business Model Canvas](image)

Figure 4. Business Model Canvas (Campbell et al. 2017, original from strategyzer.com).

Figure 4 shows the business model canvas describing the main elements of a business. According to Campbell et al. (2017:16-17), it specifically focuses on describing how the organization creates, delivers, and captures value. It also describes what value is delivered and to whom. Key partners are companies that deliver for example services or supply raw materials to the organization, this part is the equivalent to the suppliers, marked as “S” in the operating model canvas, as shown in Figure 6 (on page 22).

According to Campbell et al. (2017:16), key activities are the most important steps that the company needs to take to deliver the value proposition, this part of the model is
equivalent to the processes, marked as “P” in the operating model canvas. Key resources are the company’s assets that include people, technology, machinery, brand, buildings and locations. Key resources are equivalent to three boxes in the operating model canvas: “L” as the locations, “O” as the organization, and “I” as the information. The next four boxes that are on the right side of the business model canvas, are about the market strategy, including what to offer and to whom. The right side includes customer segments, which describes the people that the company is serving. The value proposition is about the offer to the customers of the company. The channels describe how the company communicates with the customer and the customer relationships box describes how the customers are acquired, engaged and retained. These boxes on the right have implications for the operating model.

According to Campbell et al. (2017:14-18), the operating model canvas is directly linked to the business model canvas as described earlier. It is an enhanced version of the business model’s back-end, and it shows how to deliver value to your customers as a visual presentation. The operating model canvas does not include the financial model, but it does generate most of the company’s costs. Figure 5 shows how the operating model canvas links to the business model canvas.

Figure 5. Operating model canvas links to business model canvas (Campbell et al 2017:19).
As seen from Figure 5, the operating model canvas by Campbell et al. (2017:19) contains the elements of the company that includes activities, people, processes, information systems, suppliers, locations and assets that are fundamentally needed to deliver the value proposition to the customer. Figure 6 illustrates the operating model canvas.

![Operating Model Canvas](image)

Figure 6. Operating Model Canvas (Campbell et al. 2017:18).

As shown in Figure 6, the operating model canvas includes six elements. The first one is the value chain, marked as “P” in the canvas, and it is describing the processes or work that must be done to deliver the value proposition. The second element is the organization, which describes what kind of people is needed for the work, and how they are organized. The third element is about locations, which describes where the workers are located and what assets they need. Fourth element describes the information systems that are needed for the organization to perform their tasks, and the fifth element is about suppliers who are supporting the work. The sixth element is management system that runs the organization.

To summarize, an operating model makes the link between the company strategy and operative functions of an organization. The elements of an operating model include the processes, an objective, organization, information, management system, locations and suppliers. The basics of building an operating model mean that the operating model is designed based on strategic priorities such as ambition level, drivers of value, critical
capabilities, and a definition of where to play and how to win. Additionally, the design is also based on organizational assessment about cultural strengths and weaknesses, and gaps in key capabilities. However, these concepts may need to be modified to fit also with customer care. The elements of excellent customer care are discussed next.

3.2 Elements of Excellent Customer Care

In this study, the term customer care is defined as the top-level reference to all activities that have something to do with taking care of customers. The customer care is different from the terms of customer experience management, and customer service, which in this study are considered as part of the overall customer care.

3.2.1 Strategy and Objective

The industry trends are that customer experience is taking over the price as key brand differentiation (Walker Information 2013:25). Another trend is that 86% of customers are ready to pay more for better customer experience (Oracle 2011:2). In today’s world, the typically connected customers don not make a difference between the sales, service, or marketing interactions, but instead just want their needs to be satisfied in a consistent way (Salesforce.com, 2016).

Goodman (2009:24) describes a model for strategically managing the customer experience and maximizing customer satisfaction and loyalty with a mnemonic: DIRFT. The DIRFT model comes from the words "Do it right the first time". There are times when companies fail to deliver right the first time, so there’s a need for tactical service that has two parts. Firstly, the company set expectations and prepare the customer for the use of the service. Secondly, if the customer experience is not perfect, the company needs to have processes for managing the customers interactions that follow a failure. To strategically maximize the customer satisfaction and loyalty, see Figure 7 for the DIRFT model.
According to Goodman (2009), the model minimizes the number of problems that customers experience by doing the job right the first time. In addition, it is about responding effectively to questions and problems that arise in the failure situations, or any other situation. Furthermore, to feed data about questions and problems to the right parties so that they can be proactively dealt or prevented.

Furthermore, according to Dixon (2013), in order to achieve excellent customer service, delighting the customer is not enough, but rather the customer should be delivered with effortless experiences. The companies should focus on delivering effortless experiences that create relief for the customer (Dixon, 2013:3). In addition, Kalbach (2016:35) argues that experience mapping should focus on the creation of value and describes individual’s value as a perceived benefit, which includes a dynamic concept of human behaviors and emotions.

Summing up, with the DIRFT strategy in mind and focusing on effortless experiences which increases perceived value for a customer, a customer care operating model can be developed. These three concepts of strategic objectives a suitable starting point for developing an excellent customer care operating model. The DIRFT strategy, and the
focus areas stated above are easily understood, and communicated. They aim for generating increased revenue, by retaining the customers because of increased satisfaction and loyalty.

In order to deliver the effortless experiences, increased perceived value based on DIRFT-model, the elements of excellent customer care need to be discussed next.

### 3.2.2 Customer Experience Management

According to Lemon & Verhoef (2016:82-84), customer experience management is a process that strategically manages the experiences during the customer’s entire experience with a company’s offering, services or the company. The customer experience management process consists of five steps. The first step is an analysis of customer’s experiential world. The second step includes building the experiential platform. The third step is about designing the brand experience, and the fourth step focuses on structuring the customer experience. The last step is about engaging all stakeholders in continuous innovation. Furthermore, the process steps should deal with the experiences across all the customer touchpoints. When these customer touchpoints are chronologically structured, it is called a customer journey. The process also focuses on designing the end-to-end customer journey with a strategic intent of achieving and sustaining long-term customer loyalty. According to Lemon & Verhoef (2016:82-84), the objective of customer experience designing is to provide an efficient journey with optimal experiences. See Appendix 1 for ten principles of great customer experiences introduced by Watkinson (2013:35).

Lemon & Verhoef (2016:82-84) argue that one important notion is a notion of customer experience management which includes setting an experience-oriented mindset within the firm and developing the firms internal experience management capabilities or working with external partners. Setting the experience mindset influences the organization’s internal perspective. According to Lemon & Verhoef (2016: 82-84), to achieve the experience mindset, and to deliver the customer experiences, the company needs to co-operate with a multidisciplinary approach through all company functions.

According to Lemon & Verhoef (2016:84), another important element of customer experience management is the analytical capabilities to understand and potentially personal-
ize the customer experience during the customer journey. Analytical capabilities are critical for the firm to gain valuable insight for development actions. Preferably, the measurements of customer experience are aimed at each stage of the customer journey. However, this approach may get fragmented results and, and therefore a voice of the customer concept is suggested. See Section 3.2.4 for more information on voice of the customer concept.

Thus, the customer experience management process aims to affect on the customers’ experiences during their journey. The customer experience management process focuses on the preventive actions that proactively seek to improve the customer’s experiences. This process is fundamentally important for a company that aims at effortless experiences and “do it right the first time” strategy. However, there will be moments when the experiences do not meet the customer’s expectations, and therefore a customer service process is needed as well.

3.2.3 Customer Service

Business practitioners argue that great customer service means consistently checking with the customer that they are happy with the company’s services (Darlington 2018:60). Furthermore, customer service is the company function where all the company’s claims, values and its mission are tested (Dixon 2013:2). According to Dixon (2013:2), the true test of the company’s customer service is when something goes wrong for the customer, a situation when a problem or issue comes up and the customer needs the company’s help to come up with the solution. When the customer is in most need of help, the customer service team is called upon, and the team’s job is to return the customer to neutral state, to the state that the customer was before the problem occurred (Dixon 2013:13). However, Dixon (2013:24) argues that the purpose is not to delight the customer, but rather focus on reducing the effort that customer must put in to solve the problem. Additionally, the role of the customer service is to increase loyalty by mitigating disloyalty with actions that minimize customer effort (Dixon 2013: 30).

In addition to minimizing the customer effort, the company needs a complaint solving process that is run by the customer service team. Goodman (2009:24) included in the DIRFT-model a complaint solving process that aims to minimize the amount of problems that occur for the customer during their journey with the company, by doing the job right the first time. See Figure 7 for the DIRFT-model. In the model, the complaint solving
process is described, and it includes the following steps: responding to individual customers, identifying sources of dissatisfaction, conducting root cause analysis, solving the problem, asking feedback on prevention, and improving the service quality. The process begins with an effective response to the customers questions and problems, then it identifies the actual cause of dissatisfaction. The next step is the actual problem-solving stage followed up by the feedback on how the problem solving worked, and did it prevent the issue. The process ends with the service quality improvement step, which feeds the required data to relevant parties that can prevent or proactively deal with the problems.

While the customer service team is interacting with the customer or discussing the problems, there are basic principles that should be followed. Gordon (2015:30-32) argues that caring about the customer makes it possible to differentiate from the company’s competitors, and to gain long-term customer loyalty and teaching the employees what the caring of the customer is, will contribute to the goals. See Appendix 2 for thirteen principles for great customer service and their descriptions. As described in the Appendix 2, the principles for great customer service start with friendliness (Darlington 2018:59). The principles also include actions such as showing respect, listening, responsiveness and asking feedback (Darlington 2018: 59). In addition, great customer service is about agreeability and adaptability (Brown 2014:24-26). Furthermore, the principles include ways to avoid transfer (Dixon 2018:85-89), but also showing empathy, keeping promises and gaining trust (Cook 2011: 17-19). Finally, a great customer service is about setting expectations, and exceeding the expectations (Cook 2011: 17-18).

To sum up, the customer service is the second core process in customer care. It is a reactive process which answers to customer’s questions and problems that arise and tries to deliver an effortless experience by minimizing the customer effort for solving the problem. The customer service also handles the customer complaints with a complaint solving process that aims to eliminate the issues by feeding the data to relevant parties that can proactively prevent the problems. Furthermore, there is a direct link between the complaint solving process and the customer experience management process, because the complaint solving process ends with a concept to proactively manage the problems. Another conclusion is that, as mentioned in Section 3.2.2, the customer experience management relies on a voice of the customer process to deliver customized customer experiences. This same principle applies also for customer service during the complaint solving process. Next section discusses the third core process of customer care, the voice of the customer.
3.2.4 Voice of the Customer

According to Goodman (2009:90), Voice of the customer means gathering and analyzing data systematically about company’s existing customers. It is a process that aims to understand the customer’s wants and needs, and then acting based on the results to increase profitability (Goodman 2009:90). Voice of the customer should focus on the entire customer experience (Lemon & Verhoef 2016:80-82), from marketing to purchase, from the use to repair and billing (Goodman 2009:91). Additionally, Fanderl et al. (2016) argue that ideal customer experience measurement focuses on the customer journeys, since the metrics of customer experience are everywhere. According to Goodman (2009:91), the process should have a goal that helps management to improve and redesign the end-to-end customer experience by addressing how to set expectations correctly, how to deliver the expectations, and to respond to customer’s need.

Goodman (2009) argues that to hear the voice of the customer, the company needs to interact with the people that are involved in the process of affecting the customer experience. According to Goodman (2009:92-97), the actions that create the customer experience cannot be captured with a single method or source, but instead, a good voice of the customer process includes surveys, customer contact data, and internal metrics. For example, first the internal metrics tell the company that a package is not arriving on time because it has missed a flight. Second part is the customer contact data, where the company calls the customer, and thirdly, after the service delivery, the company sends a survey. Customer contact data is gathered from the customer interactions, including discussions via phone and email for example, and this is usually real-time reporting. The internal metrics are gathered from the company operations, in order to know what’s going to happen to the customer even before the customer knows about it, and therefore it is called as leading indicators. The survey is limited knowledge, but it is still valuable. Surveys are sent after the experience, sometimes days or weeks afterwards, and therefore it is called as lagging indicator. When the voice of the customer metrics measures the experience itself, and the responses to those specific experiences, the data is most reliable.

Furthermore, Walker Information (2013) reports that companies use variety of information sources to create a holistic view of the customer by integrating the various source of knowledge. See Figure 8 for visualization of the important information sources.
As shown in Figure 8, there are plenty of information sources that should be utilized for a holistic view of the customer experience. The information sources include social media, surveys, customer complaints, online communities, CRM database, call center logs, websites, and transactions. However, the voice of the customer process is not completed only by collecting the data; it needs to be analyzed and converted into practical actions that improve the operations and the customer experience.

Summing up, the Voice of the customer process is a fundamental element in excellent customer care. Business practitioners agree that an excellent customer care starts with listening what they have to say directly, but also it must focus on any other customer-related information source, as well as the internal signals that come from operations, and employees to proactively know what is about to happen to the customer. Even sales meetings or status updates during a project are important customer contact data that should be recorded into a database for further analysis. In short, the described customer experience management, the customer service, and the voice of the customer processes require a customer care organization that operates the processes. The customer care organization is discussed in the next section.
3.2.5 Organization

Kalbach (2016:59) argues that a company's organization should be tied upon the customer experiences, and that it should mirror the customer journey instead of functional lines. Additionally, Walker Information (2013) argues that there must be a chief customer champion that oversees customer focus in the entire company. Chief customer champion's objective is to lead cross-functional teams that focus on customer initiatives, to priorities resources, tracks execution, and implement changes that improve company performance. Furthermore, the chief customer champion will manage the customer intelligence, meaning the customer information, throughout the company. Furthermore, according to Walker Information (2013:30-31), strategy team should be established that prioritizes initiatives and tracks progress on action plans. This strategy team consists of individuals from key customer experience areas, that typically include sales, account management, channel management, support, product, and logistics.

According to Goodman (2009:98), the voice of the customer process requires an owner, that can be one of the executives, or that there is a given mandate for an officer. Typically, the main responsibility of voice of the customer process is on the chief customer experience officer if that role exists in the company.

According to Walker Information (2013:32-33), a customer intelligence advocate who ensure that customer information is collected at the right time, and right place. The advocate also makes sure that the customer information is used by right areas of the company and supports the business areas by promoting customer information’s use and impacts. Additionally, the organization can benefit from an information architect, data scientist, a top account support and an engagement creator. The information architect is responsible of data management, the alignment of sources of customer information, and the creation of infrastructure for company wide accessibility to customer information. The data scientist role is about interpreting the customer information data to improve decision making. Data scientists try to predict the customer behavior and perceptions while cooperating with subject matter experts to provide insightful predictions that can be transferred into action. Top account support focuses on the account planning of prioritized customers. The top account support receives focused customer intelligence and ensures that the customer’s needs are addressed. Additionally, top account support tracks the execution of prioritized customer account plans, but also shares best practices, and systematically solves issues with other top accounts. Lastly, the engagement creator looks to understand how customers are getting and kept engaged with the company in different
forms, for example by connecting with products or services, events and even the competitors.

On the other hand, customer service teams should manage a specific customer account pool, and the customers need to know how to reach their responsible customer service personnel and through which channels (Dixon 2018:84-89). The customer service personnel should be trained to solve the customer issues and be empowered to figure out the best way of solving problems that arise while keeping in mind the strategic intent of customer care. Dixon et al (2017:112-113) argue that the customer service personnel should be outspoken and take-charge type people who are able to focus on quickly solving the customer’s problems instead of trying to delight with excellent service.

Thus, the company organization can be tied to customer experiences. However, the customer experience management process requires an additional team to manage and interpret the data, and proactively re-design the experiences accordingly. Furthermore, a customer service team is required to manage the customer contacts, questions and problems that arise. These teams need supporting functions that enable their work, and these supporting elements are discussed in the next Section.

3.2.6 Other Supporting Elements

The last three elements of customer care include information systems, locations, and suppliers that support the earlier described processes.

As mentioned earlier, information systems help the organization to perform their work. A customer relationship management (CRM) enables the use of data and customer information to understand the customer (Payne & Frow 2005:168). Therefore, Lemon & Verhoef (2016:84) emphasize the importance of customer analytics, and Walker Information (2013) implies that advanced analytics tools are needed to interpret the customer intelligence to improve decision making. However, there are also other areas where information systems are needed, for example Dixon (2018:85) argues that customers need to have access to the service through variety of channels, and therefore a customer portal and instant messaging platform are suggested. Additionally, Dias et al. (2017) promote the importance of real-time performance indicators and KPI dashboards. Also, Dias et al. (2017) also argue that ongoing capacity building and training must be conducted for a next-generation operating model, and therefore learning tools are needed.
Cook (2011:33) argues that when supplying a service to the customer, there can be many people within the company involved in the value chain, and each of them must satisfy the needs of their colleagues to deliver excellent customer service that is done right the first time. The quality of service for customer is often determined with the service quality that is provided internally among the employees to each other’s.

As discussed above, all these elements of excellent customer care are closely tied to customer experiences which occur when an individual is interacting with the company or its offering. Moreover, a customer journey map can help in visualizing the identification of most important focus areas for improvement. The customer journey, and tools for mapping the journey are discussed in the next section.

3.3 Tools for Customer Journey Mapping

There are multiple tools for customer journey mapping that can be used depending on the context. However, according to Maechler et al. (2016:1-6), customer experience can be understood only if viewed from the customer’s eyes during their entire journey with the company. A customer journey includes customer’s experiences that occur before, during, and after the interaction with the company or its offering. The customer journeys can have a long cycle, and they reach to multiple channels and touchpoints. Excellent experiences should occur during the entire customer journey, and any company that wants to aim for them needs a detailed road map for each customer journey that describes business impacts and initiatives from start to end.

3.3.1 Basics of Mapping Experiences

According to Kalbach (2016:37), companies can target services at circumstances where customers are in and analyze these circumstances rather than the customer itself. Alignment diagrams can help to visualize these circumstances by describing a broader context of goals, desired outcomes, emotions, constraints and pain points. By mapping experiences into an alignment diagram, the conditions of the customer’s jobs to be done can be holistically shared for the whole organization to absorb. The customer’s jobs to be done means the tasks that the customer tries to accomplish in given conditions (Christensen et al 2016:2).
According to Kalbach (2016:1-4), an alignment diagram as a term refers to all maps, diagrams, or visual illustrations that describe the value creation on both sides with a single overview. Furthermore, the alignment diagrams are a type of diagrams that illustrate the interaction between people and organizations. Benefits of mapping experiences into alignment diagrams are that it helps to align for value, to focus on experience rather than technology, to understand the end to end experience, to give a shared mental mode of what to achieve, to get an outside in view, to breaks organizational silos, and to enable cross functionality.

According to Adaptive Path (2013:1-5), improvement projects often focus on individual touchpoints, technologies and features, but there is no ownership for the entire journey. This kind of approach prevents organizational co-operation and understanding how everyone’s actions affect the overall customer experience. An experience map illustrates the entire customer experience. The visualized map demonstrates positive and negative feelings that people have while interacting with your product or service. By mapping experiences, a company can uncover customer’s moments that provide the opportunity to unlock more valuable overall experience. At the heart of the map is the customer journey from point A to B.

Thus, when creating a customer care operating model, an alignment diagram is fundamentally needed to have a holistic view about the customer’s end-to-end experience. Also, a visual map can help to identify opportunities for improvement, but it also aligns the organization for common goals that is essential to achieve the objectives. However, the map must be first designed, the design of the diagram is discussed in the next section.

3.3.2 Designing a Customer Journey Map

According to Kalbach (2016:6), a customer journey map illustrates individual’s experiences as a customer with the company. A customer journey map typically includes the customer’s choices to buy from the company, or to stay as a loyal customer, thus returning for re-purchase. When creating an alignment diagram, the intended use of the diagram should always be kept in mind. The relevant questions are that who is going to use the information, what is the diagram used for, what gaps it tries to identify. Additionally, this diagram is the basis for describing a customer experience, and within the experi-
ences there are relationships between the individual and the company. According to Kalbach (2016:27-32), these relationships can be described with touchpoints that mean the interaction where value exchange happens. Touchpoints include so called key instances, usually emotionally charged moments that make or break the relationship. These key instances are called moments of truth, and they provide the biggest opportunity for innovation and growth. Finally, a customer journey map puts the customer’s steps into chronological order and identifies pain points to understand how the customer does the jobs currently, and how they feel doing it.

Kalbach (2016:22-25) describes the diagram design with five key points that include the point of view, scope, focus, structure, and use. The point of view explains that whose customer experience the diagram is illustrating. The scope defines the level of detail, for example describing the journey from end to end, but leaving out details, or limit the story into part of the journey. The focus of the diagram is about a decision to describe in more detail either the individual’s challenges, pain points, actions, feelings, desires, goals and jobs to be done, or instead focus on the company’s touchpoints, offering, departments, opportunities, gaps and weaknesses. The structure of the diagram can be chosen between a few options: a chronological map, hierarchical map, a network map, or a spatial map. Each of these structures have their purposes, but the chronological is most used. Lastly is the use of the map, a decision if the map is trying to diagnose problems or improve an existing system.

Figure 9 illustrates an example of a customer journey map that focuses on customer’s positive and negative emotions while interacting with the company. The same diagram as illustrated in Figure 9 is also in Appendix 3 as a larger copy.
As shown in Figure 9, the customer journey map has the point of view of customer stakeholders during a project. The map describes the customer’s motivations during each phase of their journey. The diagram also describes the key activities that the customer is doing at each phase in chronological order. In the middle of the diagram are the emotional illustrations, the critical factors leading to positive experience with the company, as well as the critical factors leading to a negative relationship with the company. Each of these emotions either increase or decrease the relationship, and the coloring in the final phases describe the feeling levels that the customer ends up with the company after the project. Each of the so-called moments of truth are illustrated with separate icons to illustrate the most critical moments during the journey. This map focuses more on the customer’s activities and emotions, than the company’s activities, since the touchpoints and company stakeholders are described shortly in the bottom of the diagram.
3.3.3 Journey Mapping Process

According to Kalbach (2016:108-110), the actual journey mapping process can start after designing the customer journey map. There are six steps in a process of mapping a customer journey that tries to identify opportunities. The first step is the primary research that includes stakeholder interviews, interviews on site, field notes, photos, recordings, videos, but also to look at the existing knowledge of marketing research, feedback, social media, reviews, user tests, and industry reports. The second step is to create a draft diagram and to make conclusion. At this step the data is analyzed, and the findings are grouped into categories, but also the company's current offering should be compared to the draft diagram to reveal gaps in knowledge. The third step is to have a workshop, in which several stakeholders from different areas within the company should read through the draft diagram and emphasize with the current customer experience. Then at the workshop, future trends are displayed, and at each stage of the diagram a question is raised that if a trend came true, what must we do to support the customer experience and to evolve as a company. Another way of doing it at the workshop is to think about the company’s value proposition at each touchpoint in the experience, or how the organization is unique from customer’s perspective, and what meaning can the company provide to the customer (Kalbach 2016:35).

Furthermore, Kalbach (2016: 39-41 & 175) argues that the workshop could be divided into three parts, which are empathize, envision and evaluate. In the emphasize part, the purpose is to have an outside-in view about the individuals experience. In the envision part the team should think about a future that provides added value. In the evaluate part the ideas should be tested for feedback. After the workshop comes the fourth and fifth step, in which the diagram is updated with the comments from participants, and the customer’s jobs to be done are prioritized. Last step is about focusing the effort. The purpose of the last step is to visualize the opportunity space to provide a clear picture of what could be improved, but also to give confidence when making decisions.

On the other hand, Adaptive Path (2013:16-23) argues that the first steps of a customer journey mapping process should include the big picture, which includes talking to the customer, looking at existing data from various sources, call center logs, customer satisfaction surveys, existing personas, and existing research. The second step is about bringing the data to life, categorizing them into building blocks and emphasizing the most important findings. The third step is the workshop, in which the map creator facilitates, creates context, outlines goals, and guide participants. The fourth step is to visualize the
journey with a diagram that points out customer’s high’s and lows, lists feelings, thinking’s and doings. The final step is to tell a story and sketch the map, if you cannot sketch the map, then there is no story to tell.

3.3.4 Conceptual Framework for Customer Journey Mapping

Based on the discussed above, the conceptual framework for Customer journey mapping can consist of two elements. The first element is the diagram shown in Figure 10.

Figure 10. The diagram for customer journey mapping (Diagram amended from Kalbach 2016, original from www.macadamian.com, used with permission, Christensen et al 2016, and Adaptive Path 2013).

As shown in Figure 10, the diagram focuses on illustrating customer’s jobs to be done during each phase of their journey (Christensen et al. 2016, Kalbach 2016). The diagram also describes the customer’s doings, thinking’s and feelings (Adaptive Path 2013). At
the bottom of the diagram, there are the touchpoints and company stakeholders described (Kalbach 2016).

The second element of the conceptual framework for Customer journey mapping is the mapping process illustrated in Figure 11 (on page 39). As Figure 11 illustrates, the customer journey mapping process starts with primary research that includes internal interviews, drafting the current state model, and interviewing the customer. The second phase of the process is the workshop, in which the gaps and opportunities during customer journey are identified and then the findings are used for the development of a new customer care operating model together with the conceptual framework for customer care operating model that is discussed in the next section.

3.4 Conceptual Framework for Customer Care Operating Model

In this study, the joint conceptual framework for Customer care operating model consists of seven elements. These elements are illustrated in Figure 12 (on page 40).
Figure 11. Conceptual framework for customer journey mapping process (Amended from Kalbach 2016, Adaptive Path 2013).
Figure 12. Conceptual framework for customer care operating model in this study.
As Figure 12 shows, the conceptual framework for the Customer care operating model is based on the operating model canvas introduced by Campbell et al. (2017). The canvas describes the seven elements which are the Strategy and Objective, the Core processes, the Organization, Information systems, Suppliers, Locations and the Customer journey map (detailed in Section 3.3.).

The first element of the Customer care operating model is the *Strategy and Objective*, which describes what the operating model is trying to achieve. The objective of the operating model is to provide effortless experiences (Dixon et al. 2013) and to focus on delivering service quality with a do it right the first time attitude (Goodman 2009), in order to have a satisfied and loyal customer (Goodman 2009, Lemon & Verhoef 2016).

The second element of the Customer care operating model relates to the three core *Processes* that are described with an arrow in the canvas. These three processes are the *Customer experience management* (Lemon & Verhoef 2016, Watkinson 2013), the *Voice of the customer* (Goodman 2009, Lemon & Verhoef 2016, Fanderl et al 2016, Walker Information 2013), and the *Customer service process* (Goodman 2009, Darlington 2018, Dixon et al 2013, Cook 2011, Gordon 2015, Brown 2014). First, the *Customer experience management* relates to proactively seeking improvement opportunities and designing the customer journey in a way that the customer experiences are improved (Lemon & Verhoef 2016). Second, the *Customer service process* focuses on handling the customer contacts and answering to their questions and problems that arise while feeding the improvement ideas into the customer experience management process through a complaint solving process (Goodman 2009, Dixon et al 2013). Third, the *Voice of the customer process* relates to gathering and analyzing the information about the customer during their entire journey (Goodman 2009, Lemon & Verhoef 2016, Fanderl et al 2016). The Voice of the customer process includes contact data, surveys and internal metrics that need to be interpreted and translated into action (Goodman 2009).

The third element in the Customer care operating model is the *Organization* that is needed to run the processes. See Appendix 4 for an organization chart. The organization is managed by a chief customer experience manager, and it includes three teams that are a customer intelligence team, a customer service team and a strategy team. The customer intelligence team enables and owns the proactive process but also manages the voice of the customer process as well. The customer service team takes care of the customer engagement, and the complaint solving process. The strategy team consists
of multiple company stakeholders that are from different areas within the company. The purpose of the strategy team is to prioritize initiatives, and track and communicate progress on them. (Walker Information 2013, Goodman 2009, Dixon 2018)

The fourth element of the Customer care operating model is the Information systems that are needed for the organization to work efficiently. The information systems include a CRM system, a survey system, a customer portal, advanced analytics tools, learning tools, real-time communication platform, and KPI dashboards. These information systems focus on collecting information about the customer, but also enable the analysis and performance measurement in real time. Additionally, the learning tools are required to have people involved with the new way to operate. (Dias et al 2017, Payne & Frow 2005, Lemon & Verhoef 2016, Walker Information 2017, Dixon 2018)

The fifth and sixth elements include Suppliers to the process, but also the Locations and assets that are required for operation. The suppliers to the processes can be any company stakeholder that is involved within the value chain (Cook 2011: 33). When supplying a service to the customer, there can be many people within the company involved in the value chain, and each of them must satisfy the needs of their colleagues to deliver excellent customer service. When a stakeholder is in contact with the customer directly or indirectly, they may effect on the outcome of the process. Also, the quality of service for customer is often determined by the service quality that is provided internally among the employees to each other. (Cook 2011: 33)

The seventh element is the Customer journey map, which provides opportunity to identify gaps and to focus development on most critical moments during the entire customer journey. As pointed out by (Kalbach 2016, Adaptive Path 2013, Maechler 2016, Dias et al. 2017, Goodman 2009, Dixon et al. 2013), all the core processes of the operating model should be tied to the customer journeys and focus on delivering effortless experiences and high service quality during the customer’s entire end-to-end journey.

These two conceptual frameworks - for the Customer journey mapping and the Customer care operating model - are used as a basis for conducting next stage of the thesis. Next, Section 4 tells about the current state analysis conducted in the case company using both conceptual frameworks and the findings form this analysis.
4 Current State Analysis of Practices Related to Customer Care in the Company

This section analyzes the current practices and the current implicit customer care operating model existing in the case company and zooms into the customer journey. The analysis includes the strengths and weaknesses of the current operating model and defines the case company ambition level in terms of customer care.

4.1 Overview of the Current State Analysis Stage

The current state analysis consists of four steps. The first step analyzed the current Customer care operating model. It focused on the current practices of customer care in the case company. This first step derived the data from three data sources: the nine interviews, the internal documents, and the survey and customer visit data.

The nine internal interviews were conducted with relevant company stakeholders from three different service contexts. Each of the service contexts included a focus on a specific service area, service delivery model and a key customer. The service contexts are divided into three categories based on the service delivery model: the projects, consultancy, and continuous services. The interviews were conducted as a recorded Skype-meetings with a pre-selected interview template and questions that are shown in Appendix 1. The interview was divided into two phases. The first phase aimed to have a general understanding of how the case company currently takes care of the customers. The second part of the interview focused on mapping a customer journey in a pre-selected case with the focus on the pre-selected service context.

Also, the analysis of the case company internal documentation focused on the content of customer care in the sales process, three service delivery processes, key account management process, and a complaint handling process. The documented processes are analyzed to gain a deeper understanding of how the case company currently takes care of its customers currently, but also to support the interview result analysis.

Additionally, the analysis investigated the customer survey data and CRM customer visit meeting note data. The customer survey contained feedback about key account management with open questions from years 2017 and 2018. The CRM meeting note data came from 2018 and contained the customer visit meeting notes. The survey results
gave valuable insight for development since they provide an outside view on the company actions. On the other hand, the CRM data can provide valuable insight on how the customer contact data is managed, and whether there is room for improvement or not.

In the second step, Customer journey was analyzed and mapped based on the logic of the conceptual framework. This step was completed based on the analysis of nine internal interviews as the sources of data.

In the third step, the analysis pointed to the strengths and weaknesses of the current operating model and the analysis was based on the internal interviews as the source of data, but also to the best practice that was found from the literature in section 3.

Finally, the case company ambition level was defined in terms of customer care. This step was completed based on the analysis of nine internal interviews as the sources of data.

4.2 Analysis of the Current Customer Care Operating Model

The case company does not have a customer care operating model described in written currently, however, the assumption was that the company must have some implicit ways to take care of their customers in order to have customers at all. These implicit current customer care activities were first identified through interviews and internal process documentation, and then categorized and visualized in an operating model canvas that is shown in Figure 13.
Figure 13. Description of the current Customer care operating model.
As Figure 13 shows, each of the seven elements have items described, so the case company is taking care of their customers implicitly. On the left is the current strategy and values, and to the right are the objectives that the processes in the middle of the canvas are aiming at. The processes in the middle are described in three categories, the reactive, proactive and data collection processes. These processes require supporting functions that are described in the bottom as organization and information systems, but also in the top as suppliers and locations. In the middle-top is the customer journey, that shows how the entire customer journey is considered in the current customer care operating model.

4.2.1 Strategy, Values and Objective

The first element includes the strategy, values and objectives. The case company current strategy supports customer orientation, but also proactivity. These strategic settings are described in the management system at company level, so they apply to all company processes. Currently the case company management system describes the objectives to meet customer expectations and ensure customer value with customer care, however, the interview results indicate that ensuring customer satisfaction is also an objective currently (Informant 8). According to the interviews, the objective is currently reached by being responsive (Informant 2) and available for the customer (Informant 4 and 9), but also being flexible as Informant 4 describes:

We want to be available, and accessible, as we are. We’ve had good feedback about being agile. We should not always be able to answer to all requirements; however, we have been able to. Also, flexibility is really important. (Informant 4)

Additionally, the objective is to be trustworthy (Informant 1 and 7), delivering excellent service quality (Informant 4 and 5) and being proactive as Informant 8 describes:

I would say it (customer care) is all about proactivity and engagement. Good customer care means no surprises to the customer. As soon as we know the smallest change coming up, we need to escalate it. It is the surprises that customers hate. (Informant 8)

As the earlier descriptions show, the objective is different depending on who is asked. The reason might be that people interpret the objective differently, or it isn’t clearly communicated throughout the company.
4.2.2 Reactive Processes

The reactive processes include regular customer meeting practices and a complaint handling process (Document F). The complaint handling process focuses on handling a complaint when customer is not satisfied with a delivered service, a specific consultant or employee, the terms of contract, or other which is the responsibility of the case company. The complaint handling process is part of the case company continuous improvement practices. The process includes nine phases in which the complaints are received and stored, then appointed to a responsible team which starts the investigation. The investigation includes case descriptions, immediate actions, root cause analysis and preventive actions. After the complaint has been resolved, the customer accepts the decision and a case is ended. This process is well documented, and it has clear purpose and responsibilities. (Document F)

The meeting practices can be divided into four different strategic levels based on the decision power, meeting agenda and participants. The meetings are mostly divided into operative meetings, business review meetings, service management meetings and steering group meetings. Each of the meetings are also scheduled based on the business criticality, but also based on customer requirements and the service context on hand. The operative meeting practices are usually on a weekly basis (Informant 8), or when required (Informant 3). The service management meetings are mostly on a monthly basis depending on business criticality or customer requirement (Informant 8), and the business review meetings are held quarterly (Informant 2 and 8). Additionally, there are steering group meetings arranged on a monthly, quarterly, or a 6-month interval, also depending on business criticality (Informant 3). Each of the meeting practices focus on some level of business issues and have a participation of required decision power (Informant 3). The weekly operative meetings discuss mainly the daily operative issues, such as project management items or technical design issues (Informant 8). The monthly service management meetings discuss the service progress in cases where continuous services are delivered (Informant 8). The quarterly business review focuses on the customer doings currently and in the future, but also on what the company has to offer as provider (Informant 8). The steering group meetings are somewhat overlapping with the service management or business review meetings because of similar agenda. However, the steering group meetings are clearly the forum for escalated issues on hand (Informant 3 and 8). Each of these meeting practices are including customer care activities, such as handling the relationship (Informant 4) and building trust as Informant 1 describes:
Developing good relationships require skilled employees and references from successful cases, especially with the current customer, then it’s easy to continue. Easy for customer to buy and trust. In the end, the person we talk to is not the one who makes the decisions, but rather the customer must first internally sell the solution. That’s why it’s important that they can trust on our proposal/solution so that they won’t lose their confidence internally. (Informant 1)

The meeting practices also include activities such as discussing any issues on hand (Informant 5), collecting customer feedback (Informant 5), discussing improvement ideas, and in some cases even proactively informing the customer about upcoming changes and challenges in service delivery (Informant 6 and 8). However, the meeting practices are not documented (Informant 7), and are mostly tailored into a specific service context based on the customer business criticality and individually preferred procedures (Informant 7).

Additionally, the consultancy process description states that in order to deliver successful consultancy service, the manager and consultant should respond to customer satisfaction and dissatisfaction through communication. Furthermore, the consultant should adapt to customer requirements in terms of competences, tools and processes, but also professionally replace a consultant if it is required. Therefore, it is also worth to mention that the description includes a replacement of consultant process. (Document B)

4.2.3 Voice of the Customer

The current data collection process includes feedback collection, and NPS (Net Promoter Score) customer survey (Document I). The feedback collection activity is happening during the customer contacts, for example the meetings as Informant 5 says:

During the meetings, we have feedback on the management level, but the project level feedback is shared in their specific meeting. We have feedback meeting practices, in which the memos are shared. (Informant 5)

The feedback collection could also be a phone call, email message, or some sort of a form with open questions that the customer fills in (Informant 6). The NPS survey is managed with a specific tool that is designed for the surveys, and the customer fills in the NPS score, but can also answer seven more specific open questions about the company and its performance, such as capability of adding value to customers business, service quality of deliveries, ease of dealing with the provider, proactivity in suggesting solutions, and positive differentiating factors from competitors (Document I). Furthermore, the feedback is not managed in a very structured way as Informant 8 states:
We don’t manage general feedback very structured way. We manage it in terms
of these forums, but we don’t have a list to where the feedback can go in and look
at different complaints or good things. (Informant 8)

The NPS survey is a structured and well documented process for gathering customer
feedback, whereas the other feedback collection methods during the meetings or any
other interaction are not. However, there is a customer feedback form introduced in the
continuous improvement process description (Document J).

4.2.4 Proactive Processes

The proactive processes do also exist in the current way of taking care of customers.
However, most of the proactive engagement was only introduced in a one service con-
text, the continuous services, and not in all of them. The proactivity mindset, that the
company values also promote, was only mentioned in one third of the internal interviews.
The proactive processes included expectations management activities, but also proac-
tively informing the customer about changes (Informant 8). The proactivity is also han-
dled with expectations management currently in continues services. With these actions
the customer care availability and accessibility can be lowered, and they become less
important as the Informant 8 describes:

If we are proactive, and we are good at expectations management, we can drive
that accessibility and availability is not that important in service management, but
of course operative availability is different, there we need to be available. However,
if we are not good at proactivity or expectations management, we need to be 100%
available to fix the issues. (Informant 8)

As the Informant 8 states, the availability can be lower when the provider company is
proactively communicating about issues and changes for the customer. However, this
requires good expectations management practices, and proactive mindset from all stake-
holders in the provider company.

Additionally, the project process description does emphasize the importance of good co-
operation with the customer to ensure proper communication and decision-making pro-
cess, but also taking care of service quality (Document C). Furthermore, the continuous
services process description (Document D) refers to quality and continuous improve-
ment. Continuous improvement is defined as an important part of continuous services
(Document D), and it includes improvement proposals that every employee can make,
non-conformities that can be identified by any employee or customer, and customer complaints and feedback (Document J). According to the continuous improvement process descriptions, any feedback or complaints should be reported a non-conformities site (Document J).

4.2.5 Organization

The current customer care organization consists of assigned customer teams which include different stakeholders depending on the service context. In the consultancy, the customer teams consisted mainly from the consultant itself, project manager, and key account manager (Informant 1, 2 and 6). In projects service context, the customer team included a department manager, lead engineer, project manager, regional manager and a key account manager (Informant 3, 4 and 5). In the continuous services there are many stakeholders, typically everyone that are somehow related to delivery of the service are involved in customer teams (Informant 7, 8 and 9). In continuous services, the customer care organization included roles such as business unit director, key account manager, department manager, delivery responsible editor, technical documentation coordinator, service manager and a translation agency (Informant 7, 8 and 9).

Even though each of these three service contexts had different stakeholders in customer care organization, most of the roles and responsibilities were clear and communicated. The overall customer care responsibility is defined to be on the global key account manager (Document E). The responsibility of collecting feedback in projects is on the project manager, and the close co-operation responsibility is on the lead engineer (Document C). The success factors of building relationship, gaining trust, understanding customer needs and challenges, and to ensure customer satisfaction has been defined in the sales process description (Document A). However, the sales process description does not define the roles for these success factors, so it can be concluded that these are every stakeholder’s responsibilities.

4.2.6 Information Systems

The information systems are currently including a customer relationship management system (CMR), a customer survey system (NPS), a customer portal, and a real-time communication platform. Out of these three, the customer portal was only used in the continuous services context, however in the projects service context a project portal is
used like customer portal, but not as excessive in functions. The CRM, real-time communication platform and NPS surveys were available for every service context.

According to the analysis of CRM customer visit meeting note data (Document H), the CRM is used mainly for storing data about new customers, or sales related offering opportunities and status updates. The CRM data includes only limited amount of good quality customer visit data, that would include things about how the customer is doing, what challenges they are facing currently, how could the provider help the customer, or discussing development ideas. Furthermore, the customer thoughts and emotions are rarely stored into CRM, nor the customer feedback or expectations. The interview results also indicate that CRM is seen as one of the main tools for customer care, however, it is not used to its maximum potential, especially when it comes to data about existing customers and interaction with them. (Document H)

As mentioned earlier, the customer surveys are conducted as a net promoter score (NPS) survey that includes seven additional open questions. The tool itself is used in a regular basis, and it has a dedicated ownership. The customer surveys are focused on specific occasions that are currently customer visit surveys, key account surveys and customer event surveys. The plan is to have employee NPS, and service context-based customer surveys in the future. (Document I)

The customer survey results are divided into three different categories, the NPS Score, performance question data, and open comments. The study analyzed the performance question data and open questions that were focused on key account surveys and identified things that caused positive and negative experiences for the customer while interacting with the case company. The three most positive experiences were caused by co-operational capabilities, competence level, and service quality during the service delivery. On the other hand, the three most negative experiences were caused by service quality, competence level and cost efficiency. (Document G)

The real-time communication platforms are Microsoft Skype and in some cases Microsoft Teams. The partnership level relationships allow an easy access to real-time communication through these Microsoft tools. The Microsoft Skype is used in each of the three service contexts often, but Teams is starting to gain more popularity among the businesses and is currently used mainly in project service context.
The customer portal is a specifically designed tool to be the single point contact for the customer during the service delivery in all interactions with the company (Informant 8 and 9). As mentioned earlier, the customer portal is mainly used in continuous services where the customer places orders for services but can also easily follow and comment the status of production and receive the deliverables (Informant 8 and 9). The customer portal is liked by the customer, but sometimes it has been tricky to use (Informant 9).

4.2.7 Locations and Suppliers

Depending on the customer organization, the case company customer teams are functioning in a local or global environment (Informant 8). This causes specific requirements for the location. In continuous services, the customer organization is global, but it causes local requirements as Informant 8 describes:

In this case, which is complex, we have different continents, different divisions with the customer, and different stakeholders with customer. We started with a global service manager that saw the whole and focused on development. Then we needed a role that is operative and close to the different (customer) divisions. The divisional belonging was not the key driver, and we changed it to a role per site. (Informant 8)

From this description can be seen that the customer teams are globally managed, but locally present and close to the customer. Similarly, in projects context the current locations for customer teams are in close contact to the customer because of partnership level relationship (Informant 4). The local customer teams that are working with the customer in daily operative functions are mainly speaking the local language.

The suppliers of customer care are currently described only in continuous services, where a third-party translation agency is participating the customer meetings regularly (Informant 9). In consultancy context, the need for involving all stakeholders in the company for customer care (Informant 2) was identified, and that everyone is a supplier to the customer care processes.

4.2.8 Customer Journey

Currently the case company does not have customer journeys described, but as the customer journey was mapped during the interviews, it became clear that the in each of the three service contexts there are interactions during the entire customer journey, and
the meeting practices are implicitly based on the entire customer journey. Furthermore, Informant 2 also stated that a good customer service lasts the entire journey. The customer journey mapping is discussed in the next chapter.

Summing up, the company customer care operating model has not been described in the case company process descriptions. But to point out, there is a cross-reference to customer care in the key account management process description which states that the overall customer care is one of the responsibilities of a global key account manager. However, the interview results show that the customer care activities are performed even though they are not documented.

4.3 Customer Journey Mapping

The customer journeys were mapped based on the internal interviews in the earlier mentioned three service contexts: projects, consultancy and continuous services. In each of the contexts, a typical case was selected, and the customer’s steps were walked through. During the walkthrough, customer’s needs (jobs to be done) and doings (key activities) were identified. The mapping also focused on each interaction between the customer and the case company, in so called touchpoints. Furthermore, all critical factors leading to positive or negative experiences during each interaction were described and discussed. From these critical factors the so-called moments of truth were identified and marked into the map with a specific identification mark. Additionally, the case company stakeholders that had most influence on the customer experience during an interaction are shown in the map.

4.3.1 Mapping the Customer Journey in Projects

Figure 14 shows a customer journey map illustrating what the customer is doing, thinking and feeling when interacting with the case company or its offering in engineering services that are delivered as projects for a key customer.
As Figure 14 shows, there are different phases in the customer journey, which all have a specific customer job to be done. The phases are planning, decide, start of project, project execution, project close-out and maintaining the relationship. Customer doings (key activities) that include interaction with case company are described in each phase. The planning phase includes interactions such as estimating the need for upcoming project, resourcing tasks internally, preparing the project budget, and asking for quotation. In decide phase the doings included activities like receiving the offer, evaluating the providers, negotiating the offer, and making the decision to purchase. In the start of project, the customer attends the project kick-off meeting, and participates in planning the detailed project steps. In the project execution phase, the customer has daily interactions with the case company, attends weekly design review meetings, quarterly steering group meetings, receives monthly invoices, handles project memos, purchases required materials for manufacturing and attends the pre-assembly review. In the project close-out phase, the customer participates in close-out meeting, gives feedback about the project and discusses development ideas and lessons learned. The last phase is maintaining the relationship, that includes weekly follow-up meetings, discussing upcoming projects and receiving sales calls for new solutions. (Informant 3, 4 and 5)

During each of the phases, and interactions with the case company, the critical factors that lead into positive or negative experience were also mapped. As Figure 14 shows, in planning phase the positive experiences include thoughts such as having the capacity to handle the projects, and always trying to find a solution for delivery. In decide phase, the positive experiences include negotiations in which the customer was not put pressure on, but also that the companies used a fixed budget which saves time. In the start of the
project some positive experiences were about having a person with right competence and attitude to lead the project, and keeping the scope as promised. In the project execution phase, there were multiple factors that lead into positive experiences, such as long-term experienced people that the case company had to offer, but also good project management practices were positive experience. The case company was considered easily reachable and available, but also the flexibility was causing positive experiences. Furthermore, a well progressing project in general causes positive experiences, and additionally the fact that there are no quality issues. Staying on schedule, keeping low costs with agreed quality were critical factors leading to positive experience in the last stages of the project. In the project close-out phase the customer was evaluating the results, and the fact that case company had helped the customer to deliver caused positive experience in general. Additionally, the mindset and practices for discussing the development ideas or lessons learned were positive factors. In the maintaining the relationship phase the capacity to handle many projects simultaneously caused positive experiences. (Informant 3,4 and 5)

The negative factors during each stage were about changes to the project scope in the decision phase. In the start of project things like scope not aligning with actual plans is causing disappointment, but also any missing or incomplete initial data is a critical factor causing negative experiences. Furthermore, if the case company is not able to provide competencies that were asked caused some negative experience. In the project execution phase, things such as bad service attitude, or budget not matching the actual work, or project being behind of schedule caused negative experiences. Additionally, service quality issues such as wrong materials in part lists make purchasing more challenging, and may cause delays in schedule, as well as many changes to the drawings or any mistakes in the drawings that lead to negative experiences. (Informant 3,4 and 5)

From all the critical factors that lead to positive or negative experiences most important were identified as so-called moments of truths. These moments were highlighted into the map with stars and red triangles. The internal interviews recognized the non-pressured negotiations, weekly project follow-up meetings and pre-assembly reviews as moments of truths. In these interactions, the project meeting practices and staying on schedule were most critical factors that lead to positive experience. On the other hand, the negative experiences were identified as being behind of schedule or having quality issues regarding the documentation that is being delivered in the project. (Informant 3,4 and 5)
Although the customer journey map focuses on the customer activities and experiences, it also indicates in less detail what kind of touchpoints there are during the journey, and which stakeholders have the most effect on the experience during an interaction. As Figure 14 shows that the touchpoints include face to face meetings, phone calls, skype meetings, memos, a project portal, MS teams, word of mouth and quotation documents. Most of the interaction are happening via skype or email, however, the face to face meetings are also preferred in a regular basis. (Informant 3,4 and 5)

4.3.2 Mapping the Customer Journey in Continuous Services

Figure 15 shows a customer journey of outsourcing technical documentation as continuous services. (Informant 7, 8 and 9)

Figure 15. Customer journey map in continuous services (Informant 7, 8 and 9).

The main finding from the continuous services context customer journey mapping is that its much more complex journey than in projects, but also the customer care is on more advanced level. The main phases of the continues services were building consensus, decision, start of service, transition, continued production and agreement renewal. The critical factors leading to positive experiences included things such as proactive communication, no surprises and expectations management in the start of service phase, but also communicating all smallest changes early enough so that it allows the customer to prepare for them. During the continued production phase, the positive customer experiences included things such as giving guidance for the customer to improve as a requester, having single point of contact through the customer portal, and continuously
proposing new improvement ideas. Furthermore, case company ability to adapt to new needs and adapting to changes in scope of service were positive experiences. During the phase just before contract renewal discussions, and in the renewal discussions customer seeing the delivered efficiency, high quality and low costs to realize as promised is seen as a moment of truth. Additionally, showing that the case company has delivered a lot of added value for the customer was identified as a moment of truth. (Informant 7, 8 and 9)

The negative experiences in continues services included things such as disappointment about the decision to outsource and being worried about the change of employer. Also adapting to new ways of working, changing from old systems to new, and poorly communicated changes were not liked and caused negative experience. Additionally, during the transition phase, being behind of schedule was causing much negative experience. During the continued production phase, the cost of implementing of new processes was stressing the customer, but also the new customer portal was seen tricky to use. Furthermore, the customer wanted as little as possible involvement during continued production, and any unnecessary involvement would cause additional disappointment. The only moment of truth that was identified is about unexpected costs that may occur during the continued production. There was also some confusion about manuals being different from the old and usual, which caused negative experiences, but also the invoices were not understandable enough, because different person was involved with ordering and paying the invoice. (Informant 7, 8 and 9)

4.3.3 Mapping the Customer Journey in Consultancy Services

Figure 16 shows a customer journey of software and embedded systems as a consultancy service.
Figure 16. Customer journey map in consultancy services. (Informant 1, 2 and 6).

The customer journey in consultancy services included customer phases such as planning and investigation, decision, contract making, using the service and maintaining the relationship. The main findings in consultancy services regarding the customer experiences were that earlier references about personnel competence caused positive experiences. Also, a clear moment of truth was in the decision phase where the consultant was interviewed by the customer, and either seen as a suitable or not to work in the assignment. Additionally, in the contracting phase a pre-filled contract makes the contracting process much faster, and easier. During the use of the service, there were positive experiences about flexibility, correct competencies, quickly reacting to problems that arise, effortless invoices and feedback surveys, and occasional delight for the customer teams. (Informant 1, 2 and 6)

The negative experiences during a consultancy service were about the case company website that does not market much about the consultancy offering, or that the contract process being slow, challenges due to vacations or the flexibility with the starting date of an assignment. A clear moment of truth during the use of the service was the competency of the consultant, and not meeting the expectations of the customer in performance. This issue caused the customer to be feeling ashamed because of taking responsibility of hiring the consultant in the first place. In cases where a consultant is replaced, the customer is stressed about the replacement that is needed quickly. (Informant 1, 2 and 6)
To summarize, as the focus of the customer journey map is in the customers doings and experiences, any good practices in taking care of the customer can be looked at in many contexts. Therefore, the current state analysis mapped three alternative contexts which were the projects, consultancy and continuous services. The mapping process identified that the customer journey in consultancy and continuous services context differs from the customer journey in projects. The mapping process also recognized that the customer interactions include some similarities in terms of meeting practices, but not all interactions remain the same. Also, the customer phases are different, and the experiences differ to some extent. However, some similarities such as staying in schedule, having high service quality, offering competent solutions, proactive communication and keeping promises apply to all the customer experiences and is not depended about the service context.

All the earlier discussed customer experiences that lead to positive or negative experiences are only the case company internal view about the customer's doings and feelings. Therefore, it is important to have the customer verification to the customer journeys that were introduced in this chapter. The customer interviews are discussed during the development of a new operating model in section 5.

4.3.4 Summary of Critical Factors in the Customer Experience

Figure 17 shows a summary of the critical factors that lead to positive or negative customer experience in three service contexts.
As Figure 17 shows, there are some key factors that affect the most to the customer experience. In consultancy service context, the positive factors are related to responsiveness and service quality. The negative experiences are related to competencies and service attitude. In projects service context the positive experiences were considering proactivity, service practices and partnership. The negative experiences were related to competencies, change management, risk management and service quality. In the continuous services proactivity, expectations management, effortlessness, continuous improvement and service efficiency were causing most positive experience. On the other hand, negative customer experience was caused by missing expectations management or risk management, and missing change management.

4.4 Analysis of Current Operating Model Strengths and Weaknesses

Figure 18 illustrates the description of the strengths and weaknesses of the current customer care operating model at the case company. The strengths are described in black color, and they are indicated in their specific box within the operating model canvas that was introduced earlier. The weaknesses are indicated with red color in their specific boxes of the canvas.
Figure 18. Description of the current Customer care operating model strengths and weaknesses.
As Figure 18 shows, there are many strengths within the current operating model, but also some weaknesses were identified during the current state analysis. The main findings are categorized in the operating model canvas with the seven elements that include strategy and objective, core processes, organization, information systems, suppliers, locations and the customer journey.

In the first element which is the *Strategy and objective*, the strengths are proactivity and customer orientation that are embedded into the company level values. Meeting the customer expectations and ensuring the customer satisfaction are strengths, however, the weakness is that the current objective isn’t written clearly to aim for increased customer loyalty in the company management system, even though the customer feedback survey is measuring the loyalty level with NPS score.

The second element is about the *core Processes*, which are the *Reactive process*, the *Voice of the customer process* and the *Proactive processes*. In the Reactive process the strengths are regular customer meeting practices on different decision levels, and a customer complaint solving process that has been established and documented. On the other hand, the weaknesses are that each unit is doing customer care their own way, and the customer care processes are in some cases focusing only on the ongoing assignments and projects instead of the total customer journey. The *Voice of the customer process* includes regular feedback collection practices, NPS surveys and metrics which are clearly the strengths of the data collection process. However, the customer data and feedback may not be stored or utilized in a structured and efficient way for improvement. Additionally, the customer visit data that is recorded into CRM could be better quality, and therefore it cannot be used for analysis as such. Another weakness in the voice of the customer category is that the NPS surveys are not customer journey based, focusing to the most critical moments during the customer journey, but instead targeted into random customer visits or events and a calendar based key account management surveys.

For the *Proactive process* there are clear strengths identified, such as the proactivity mindset and values, but also the expectations management and proactive communication about changes or challenges in some contexts. The weakness of the proactive process is mainly about the missing way of systematically improving the customer experience during the entire customer journey.
The third and fourth elements were about customer care. The findings about customer care organization were that there are assigned customer teams in which the roles and responsibilities are mostly clear, so this is seen as a strength. However, as there’s no process for systematically improving the customer experience during the customer journey, there also isn’t a team for data analysis and utilizing the data results to improve the total journey experience currently. Additionally, the strengths of the information systems are that the most important systems that already exist, and they are used, however, again the weakness is tied to the data analytics tools and utilization of the collected data in a structured way for improvement actions.

The fifth element is about suppliers. The Suppliers element has a strength that the third-party suppliers were involved in the customer meetings regularly at least in one service context, however, a common mistake that is usually done with the customer care process suppliers also occurs in the case company current operating model. The mistake is that not all stakeholders working in the company are seen as responsible suppliers to the customer care process, where as everyone that is in any way connected to the offering or any interaction that the customer has with the company, should be participating to the customer care process. The customer care is everyone’s responsibility, but especially the employees that are in close contact to the customer.

The sixth and seventh elements are describing Locations and the Customer journey. In both elements, only strengths were identified that were staying close to the customer and preferably interacting in the local language which happens to be the case in these three service contexts that were studied. For the customer journey, there’s a single point of contact available throughout the journey in one service context and it seems to be working. Additionally, the meeting practices were mostly based on customer requirements and business criticality, which is a clear strength. Furthermore, the single point of contact during the entire customer journey was identified as a strength that should be embedded into the new customer care operating model.

4.5 Defining the Ambition Level in Terms of Customer Care

As a critical part of the study, the aim was to identify the case company ambition level in terms of customer care in general. Defining the ambition level is important because it sets the boundaries for the strategic customer care, but also gives direction in terms of
The ambition level was studied with two open questions through internal interviews on relevant stakeholders. The list of identified ambition levels in terms of customer care is shown in Table 3.

Table 3. List of identified ambition levels in terms of customer care.

<table>
<thead>
<tr>
<th>Description of ambition level</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td><strong>Availability Characteristics</strong></td>
<td></td>
</tr>
<tr>
<td>Helping the customer at any time, any location (at least regarding critical accounts)</td>
<td>Informants 1, 4, 5, 6, 7, 9</td>
</tr>
<tr>
<td>Responding to customer questions and issues within 24 hours</td>
<td>Informant 2</td>
</tr>
<tr>
<td>Staying close to the customer</td>
<td>Informant 3</td>
</tr>
<tr>
<td><strong>Communication Characteristics</strong></td>
<td></td>
</tr>
<tr>
<td>Proactively contacting the customer about changes to avoid any surprises and 100% availability</td>
<td>Informant 8</td>
</tr>
<tr>
<td>Excellent communication and continuous dialog with the customer</td>
<td>Informant 9</td>
</tr>
<tr>
<td>Customer specific contacting procedures in a proper rhythm</td>
<td>Informant 6</td>
</tr>
<tr>
<td><strong>Process Characteristics</strong></td>
<td></td>
</tr>
<tr>
<td>Aim to build partnership level relationships</td>
<td>Informant 4, 6, 7</td>
</tr>
<tr>
<td>Customer care being responsibility of everyone</td>
<td>Informant 2</td>
</tr>
<tr>
<td>Customer service during entire journey</td>
<td>Informant 2</td>
</tr>
<tr>
<td>Listening, but also guiding the customer</td>
<td>Informant 9</td>
</tr>
<tr>
<td><strong>Other Characteristics</strong></td>
<td></td>
</tr>
<tr>
<td>Flexibility, engagement and proactivity</td>
<td>Informant 5, 8</td>
</tr>
<tr>
<td>Professionalism and trustworthiness</td>
<td>Informant 8</td>
</tr>
</tbody>
</table>
As Table 3 shows, the current state analysis resulted in defining the case company ambition level, based on multiple interviews and the analysis of internal documents in the company. The results are categorized into four characteristics that are Availability, Communication, Process and Other. In the Availability category, the most important characteristic is that the company helps the customer at any time and in any location. It means that the company wants to be there when the customer needs help. In the Communication characteristics, the ambition level is having continuous dialog with the customer, and in a way that the communication is done in a proper rhythm that fits the customer requirements, and even proactively. The aim is to avoid 100% availability by proactively communicating any changes or problems that arise to the customer. In the Process, the most important characteristics include the ambition to aim for partnership level relationships with the customer. Furthermore, the customer care should be everyone’s responsibility, and customer service should be established during the entire journey. The Other characteristics for the ambition level included flexibility, professionalism, trustworthiness, engagement and proactivity.

4.6 Key Findings from the Current State Analysis (Data Collection 1)

The outcome of the current state analysis is a summary of strengths and weaknesses of the current customer care operating model including the definition of case company ambition level in terms of customer care. The key findings of the current state analysis are shown in Figure 19.
Figure 19. Key findings from the current state analysis stage (Data collection 1)

As Figure 19 shows, the strengths include good meeting practices to ensure customer satisfaction, a complaint solving process, NPS surveys and metrics, regular feedback collection on various levels, proactive communication, proactive mindset and values, expectations management, continuous improvement activities, assigned customer teams, important information systems are established, staying close to the customer, single point of contact during the entire journey, and that suppliers are involved. Each of these strengths can be embedded into the new operating model.

The weaknesses included issues related to different customer care practices between functional units within the case company, but also to the fact that customer care only focuses on ongoing assignments and projects. Additionally, some weaknesses with the feedback collection and further use of the data gathered for development were identified. The feedback wasn’t effectively stored despite the instructions stated in the continuous improvement process. Furthermore, the customer visit data (contact data) is currently poor quality, and it could be improved to include more accurate data about the customer visits. Also, the NPS surveys are not tied to customer journeys, and focused on critical touchpoints. The missing data analytics tools and resources together with systematic way to improve customer experience during the entire customer journey is an identified
weakness currently. Additionally, the customer care is not currently described in written
to aim for increased customer loyalty, and the customer care is not seen as a responsi-
bility of all stakeholders that are directly or indirectly in contact with the customer. Each
of these weaknesses provide an opportunity for development while creating the new op-
erating model.

The case company ambition level can be divided into four characteristics, *the Availability,
Communication, Processes* and *Other*. The case company wants to help the customer
at any time and any location at least on big customer accounts. Additionally, the cus-
tomer teams should be close to the customer, and respond within 24 hours to any ques-
tions and problems that arise. The ambition level is to have proactive communication to
avoid 100% availability, to have continuous dialog with the customer, and to have cus-
tomer specific contacting procedures in a proper rhythm. *The Process* characteristics
include the ambition to build partnership level relationships, having customer care as
every stakeholder’s responsibility, servicing the customer during the entire journey, and
listening to the customer while also giving guidance. Additionally, according to the inter-
views, the case company ambition level is to be engaged, flexible and proactive, but also
trustworthy and professional. At the development phase of the new operating model,
the case company ambition level sets the boundaries of what level of customer care the
new model should aim at.

To summarize, the current state analysis described the current implicit customer care
operating model and mapped the customer journeys in three service contexts. The cur-
rent operating model strengths and weaknesses were analyzed, critical factors leading
to positive or negative experience was identified, and the ambition level of the case com-
pany in terms of customer care was defined. Together with the conceptual framework
that was introduced in section 3.4, and the current state analysis results, the new cus-
tomer care operating model can be developed. The focus of the development workshops
is in embedding the identified strengths into the new model, but also in taking the oppor-
tunity to propose improvements on the identified weaknesses of the current model. Ad-
ditionally, the defined ambition level is considered as a guideline when developing the
strategy for the new customer care operating model in section 5.
5 Building Proposal for Customer Care Operating Model in the Case Company

This section merges the outcomes of conceptual framework and current state analysis to develop a new customer care operating model for the case company in one service context.

5.1 Overview of the Proposal Building Stage

The purpose of this stage is to create the initial proposal for the new customer care operating model in the case company. This new operating model is aimed for future, and some parts of it need to be first built and implemented before the model is fully operational in the case company. The model is built for one service context: the Engineering services delivered as projects.

The proposal for the customer care operating model was build based on: (a) the conceptual framework, (b) the outcomes of the current state analysis, and (c) the input form the company stakeholders who were involved to co-create the Customer care operating model.

As identified from the current state analysis, the weaknesses of the current implicit Customer care operating model related to issues such as different customer care practices between functional units within the case company, but also to the fact that customer care only focuses on ongoing assignments and projects. Additionally, some weaknesses with the feedback collection and further use of the data gathered for development were identified. Furthermore, customer data quality could be improved, and the customer surveys could be customer journey based. Additionally, data analytics tools and resources are missing, but also a systematic way to improve customer experience during the entire customer journey. Also, the customer care is not currently aiming for increased customer loyalty, and the customer care is not seen as a responsibility of everyone that is directly or indirectly in contact with the customer.

The building of the proposal was conducted in three steps. The first step focused on collecting improvement ideas to the current customer journey, based on the views with the customers. This step set to identify the truly critical factors that lead to a positive or negative customer experience when interacting with the case company or its offering.
The data source for the first step included customer interview (from one service context) to have an outside-in view on the internally drafted customer journey in Engineering services delivered as projects.

The second step included workshops in which the case company key stakeholders were involved and could suggest development actions to customer journeys. The workshops focused on understanding the customer journeys in the projects service context, but also to identify any gaps and opportunities in the customer experience during the customer journey. During the second step, there were in total two workshops, where the participants first analyzed the customer journeys, and then they could comment on the journeys how the customer experience should be like, what are the gaps to the current experience, and what opportunities does the case company have in each stage of the journey.

The third step included one workshop in which the focus was on developing the new customer care operating model for the selected service context. The case company key stakeholders were also involved in this workshop, in which the identified opportunities in the customer journey, the case company ambition level in terms of customer care, the conceptual framework and the results of the current customer care strengths and weaknesses are used to develop a new customer care operating model.

This approach was selected in the proposal building stage because the case company stakeholders need to first understand the entire customer journey before developing a new customer care operating model. Additionally, a customer view was required to have true understanding of the most critical moments during the customer journey. After the case company stakeholders understand the entire customer journey that is based on an outside-view, the development of a new customer care operating model can start.

5.2 Findings of Data Collection 2

This section discusses the findings of data collection 2. The findings consist of key customer development suggestions, key stakeholder suggestions to improve the customer journey, and key stakeholder suggestions for defining the initial proposal for the customer care operating model in engineering services delivered as projects.
5.2.1 Key Customer Development Suggestions

An outside-in view to the customer journey was collected from the key customer whose journey was first mapped internally in the current analysis stage. The initial plan was to interview one key customer in each of the service areas, but due to scheduling reasons only one key customer was interviewed. Table 4 shows the key results from the interview with a key customer for which the service is delivered as projects.

Table 4. Key customer suggestions for proposal building (Data 2) in relation to customer journey in projects.

<table>
<thead>
<tr>
<th>Phase in the customer journey</th>
<th>Suggestions from a key customer</th>
<th>Description of the suggestion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Maintaining the Relationship</td>
<td>The customer journey should begin with having a relationship with the customer.</td>
<td>During this phase the critical factors leading to positive experience are to have shared long-term goals with the customer company, and to be able to support the reliability of delivery. (Informant 10)</td>
</tr>
<tr>
<td>2 Decide</td>
<td>Availability of best lead engineers from the service provider.</td>
<td>During this phase the critical factors leading to positive experience are that the persons available are motivated and competent to lead the projects. On the other hand, this could also lead to negative experience without motivation or competency. (Informant 10)</td>
</tr>
</tbody>
</table>
| 3 Start of Project            | a) Supporting the customer during start up.  
                                b) Proactive actions.  
                                c) Initial data communicated both ways. | In this phase the critical factors leading to positive experience are that the service provider supports the customer engineering during start up, but is also proactively designing the start of project. On the other hand, incomplete initial data that is not communicated both ways are causing negative experience. (Informant 10) |
| 4 Project Execution           | a) Ensuring good quality.  
                                b) Keeping the project in schedule.  
                                c) Supporting the customer lead engineers.  
                                d) The core team staying on the same project.  
                                e) Proactive communication. | During this phase the critical factors causing positive experience included proactive communication when the project is behind of schedule. Also supporting the customer lead engineers and having core team on the same project always while maintaining good level of reliability of delivery caused positive experiences. On the other hand, factors leading to negative experience included invoicing the additional sales as the customer didn’t anticipate that high costs. Also, not notifying about changes on documentation early enough was causing negative experience. (Informant 10) |
5 Project Close-Out  | a) More feedback sessions.  
b) Making sure that quality issues are fixed with agreed quality.  
| There have been feedback sessions, but they are difficult to keep. However, this is important part of the journey. Additionally, if there are quality issues during the journey, they should be fixed with agreed quality. (Informant 10)

6 Maintaining the Relationship  | Building trust both sides is important.  
| Critical factors leading to positive experience include building up the relationship with shared long-term goals, gaining trust and continuous improvement. (Informant 10)

As Table 4 shows, the key customer emphasizes the importance of first developing a relationship that shares long-term goals. Additionally, in the beginning the focus should be on supporting reliable delivery. In the decision phase where the customer chooses the service provider, it is critical to have correct competencies available. In the start of the project it is critical to have enough support from the service provider to the customer engineering, but also to make sure that the initial data is communicated both ways. To ensure positive experiences during the project execution phase, the provider should ensure good quality of service, keeping the schedule, supporting the customer, having the core customer team to stay on the project, and proactively communicating any changes on documents early enough. The project close-out phase is about making sure that the identified quality issues during the project are fixed with good quality. There are currently feedback sessions, but more of them could be held during the close-out. During the relationship maintaining phase, it is important to build trust on both sides, aim for shared long-term goals and continuous improvement.

5.2.2 Improving the Customer Journey

The three mapped customer journeys were analyzed in two workshops together with the company key stakeholders. The purpose of the workshops was to think how the customer experience should be like in each phase of the journey, and to identify possible gaps and opportunities in the customer experience during the customer journey. This analysis was done for three different service delivery models, the projects, consultancy, and continuous services. However, only engineering services delivered as projects are focused in the proposal. The results of the workshop for customer journey in projects are shown in Table 5.
Table 5. Key stakeholder suggestions for proposal building in relation to customer journeys in projects.

<table>
<thead>
<tr>
<th>Phase in the customer journey</th>
<th>Suggestions from a key stakeholder</th>
<th>Description of the suggestion</th>
</tr>
</thead>
</table>
| 1 Planning & Maintaining the Relationship | a) Agreed co-operation process with the customer.  
 b) From resources to solutions.  
 c) Risk Management. | The case company should be first choice in the customer’s mind when selecting the provider, so should be an agreed co-operation process. (Informant 12)  
 Also, there is an opportunity for the case company to provide solutions instead of resources. (Informant 12)  
 Another opportunity is to establish risk management activities during the first phases (Informant 13). |
| 2 Decide | a) Easy and fast purchasing for the customer.  
 b) Case company trustworthiness.  
 c) Removing technology risk from project scope.  
 d) Communication skills.  
 e) Understanding expectations. | Easy and fast for the customer to make purchase decision with the case company. The case company should also be trusted. (Informant 12)  
 In this phase, the technology risks should be taken out of the project scope. Additionally, the sales personnel communication skills need to be at required level to understand the customer expectations. (Informant 13) |
| 3 Start of Project | a) Proactivity  
 b) Project management tools  
 c) Case company trustworthiness.  
 e) Responsiveness. | The customer experience should include proactive activities. (Informant 12)  
 There might be a gap in project management tools that could be improved. Also, the customer should be able to trust the provider company. (Informant 12)  
 The provider company must be fast in responding to customer questions and problems. (Informant 12) |
| 4 Project Execution | a) Easy, open and dense communication.  
 b) Agreed quality.  
 c) Staying in budget & schedule.  
 d) Key contact point.  
 e) Responsiveness.  
 f) Change management. | The communication should be easy, dense and open both internally and externally. (Informant 12)  
 The provider company should also keep agreed quality of service, but also to stay in budget and schedule during execution. (Informant 12)  
 During project execution there should be a single key contact point for the customer, |
As Table 5 shows, there are multiple suggestions for each phase during the customer journey. As mentioned earlier, these describe how the customer experience should be like, but also describe the opportunities for improvement.

The first phase is the planning and maintaining the relationship. This phase should include agreed co-operation processes with the customer (Informant 12). A co-operation agreement helps to keep up with the relationship building that aim for shared goals and gives clear guidance for both parties how to operate. Additionally, two opportunities are identified during the first phase of the journey. First opportunity is about selling solutions instead of resources (informant 12), and the second opportunity consist of risk management (Informant 13). The solution selling can be beneficial for the customer in terms of improved overall value generation potential and customer care, but also for the service provider in terms of increased revenue. The risk management improves service quality, makes it easier to stay in schedule and ensure reliable delivery, but also enables proactive communication activities when a risk is identified in the early phases of the project delivery. Together with proactive communication the risk management can avoid unpleasant surprises to the customer, and as the key customer mentioned, it is always a
good experience to communicate proactively about challenges so that the customer is able to prepare for them early enough (Informant 10).

The second phase during the journey is the decision-making stage. The key stakeholder suggestions included items such as ensuring easy and fast purchase decision making for the customer (Informant 12). The case company trustworthiness (Informant 12) suggestion is closely related to the earlier suggestion about purchase decision. These two suggestions can affect the customer experience positively and are as such important pieces of the decision stage in the customer journey. Additionally, Informant 13 suggests that technology risks should minimized during this stage of the project, and that the sales team communication skills should be at required level to understand the customer expectations correctly. The technology risk avoidance can help the project to stay in schedule and budget, but also it affects the service quality and the end results. Therefore, focusing on risk management also in this phase of the journey, much more positive customer experience can be generated. When the sales team communication skills are at required level, a correct understanding of customer expectations is obtained and it is easier to provide the best available solution for the customer.

The third phase of the customer journey is the start of project. Key stakeholder suggests that proactivity, project management tools, trustworthiness and responsiveness should be emphasized (Informant 12). By being proactive, the provider company can support the customer engineers with the early stage design, but also with the changes to scope. All changes to the scope should be communicated proactively, but also some pre-designing could be done early enough to support the customer during the start of project.

During the fourth phase, the project execution, the communication should be easy, dense and open (Informant 12). The provider company should stay in schedule and budget naturally, but also have agreed service quality (Informant 12). Additionally, a single point of contact for the customer is preferred during the entire journey, and this contact needs to be responsive (Informant 12). Furthermore, during the project execution, the risk management is seen as an improvement opportunity together with change management (Informant 13). These two should be used in combination while delivering the projects (Informant 13), so when a risk is managed, there should be change management also supporting the management of the risk. Additionally, when there are offshoring activities to another countries, the communication between local teams and the offshored project manager should be ensured (Informant 11).
The fifth phase of the journey is the project close-out. In this phase, there could be more lessons learned activities (Informant 12). Additionally, the project KPI’s should be examined and discussed if the targets have been reached and how much value was generated for the customer (Informant 12). Showing the customer the amount of value generated is important to gain the trust of the customer that it was worth to buy the service from the case company. Therefore, an opportunity for upselling was also identified during the project close-out phase (Informant 12).

The sixth phase of the journey is maintaining the relationship. During this phase the key stakeholder suggested that customer should experience continued service (Informant 12). Additionally, there should be reviews on what is the status of the relationship (Informant 12).

5.2.3 Development Suggestions to the Customer Care Operating Model

The definition of the new customer care operating model was done in a workshop together with key stakeholders in the company. The suggestions for building the new customer care operating model are shown in Table 6.

Table 6. Key stakeholder suggestions for proposal building in relation to the key elements in conceptual framework.

<table>
<thead>
<tr>
<th>Key element of Conceptual Framework</th>
<th>Suggestions from stakeholders</th>
<th>Description of the suggestion</th>
</tr>
</thead>
</table>
| 1 Strategy, Objective and Characteristics | a) We should add innovativeness into characteristics.  
  b) We should be available as agreed. | Customers want us to be innovative and propose new solutions continuously. Also, we should aim to be available as agreed with the customer. (Informant 17) |
| 2 Reactive Processes | The complaint solving process may not be used in every context. | Complaint solving process does not fit into every context. Additionally, the process is currently not fully functional. (Informant 16) |
| 3 Voice of the Customer | a) We should have a customer intelligence data analysis process. | This process describes how the customer data is stored, handled and processed for further use. (Informant 16 & 19)  
  Instead of just focusing on the customer data, we should also assess the organization internally to have an idea what is wrong |
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td><strong>Proactive Processes</strong></td>
<td>b) We should do also organizational assessment. From our own point of view that could affect the customer experience. (Informant 18)</td>
</tr>
<tr>
<td></td>
<td>a) The proactive processes should be categorized.</td>
<td>Categorize proactive processes into execution, quality, business development and other characteristics. (Informant 18)</td>
</tr>
<tr>
<td></td>
<td>b) The proactive processes should be simple.</td>
<td>Keep the proactive processes simple, so that there is a clear structure, and easy to understand. (Informant 17)</td>
</tr>
<tr>
<td></td>
<td>c) Communication plan for projects.</td>
<td>The communication activities could be described in a communication plan for each project. (Informant 19)</td>
</tr>
<tr>
<td></td>
<td>d) Partnership is covered in Key Account Management process.</td>
<td>Partnership level relationships are built with existing Key Account Management process. Apply that process into the model. (Informant 19)</td>
</tr>
<tr>
<td>5</td>
<td><strong>Customer Journey</strong></td>
<td>Don't present the customer journey in the model. A chronological presentation within the model does not work. Mention that the processes aim to improve the customer journey with one sentence above the processes. The journeys are tools for developing the model. (Informant 16 &amp; 18)</td>
</tr>
<tr>
<td>6</td>
<td><strong>Organization</strong></td>
<td>The process itself does not necessarily require new teams. The proposed processes can run with the current organization, however, a new organization for customer care is also an option in long run. (Informant 18)</td>
</tr>
<tr>
<td>7</td>
<td><strong>Information Systems</strong></td>
<td>Add Skype and MS Teams to communication tools. Instead of calling the communication tools as real-time communication platforms, call them with names, such as Skype and Teams.</td>
</tr>
<tr>
<td>8</td>
<td><strong>Locations</strong></td>
<td>a) Remote support &amp; Work. b) Multi-Site Co-operation. c) Services present for the customer, but not physically close. We don’t necessarily want to be physically close to the customer, but our services should be present for the customer. Additionally, we should provide remote support and work from our multi-site offices. Also aim for multi-site co-operation between sites. (Informant 19)</td>
</tr>
<tr>
<td>9</td>
<td><strong>Suppliers</strong></td>
<td>a) Change the name of this element. Call the suppliers element as supply chain to the process. This makes it clearer what the box is about. (Informant 16 &amp; 19) b) Add more details to this element. Add subcontractors, IT providers, Material suppliers, Near-shoring and Off-shoring partners. (Informant 19)</td>
</tr>
</tbody>
</table>
As Table 6 shows, there are development suggestions to each part of the operating model provided by the key stakeholders. These suggestions included improvements to the characteristics in terms of customer care, such as being innovative, but also some limitations to availability in a way that the company wants to be available as agreed, not always which was the ambition level in the first place. Additionally, in the voice of the customer program, there could be a customer intelligence data analysis process that would include the instructions and steps for storing, handling and analyzing the collected data in a way that the data can be utilized in decision making process. Furthermore, as the customer point of view is covered with the many way of collecting customer data, the company should perform organizational assessment activities to gain the internal view on what is working and what is not, since that may affect the customer experience after all. It is a good addition to the customer point of view, and it supports the voice of the customer concept for a holistic situational awareness. Development suggestions to proactive processes included items such as categorizing the proactive activities into four sections: the execution, quality, business development and other characteristics. Also, one suggestion was to keep the proactive processes simple. The categorization can help with the simplifying itself, and is as such good suggestion, however, the importance of communication and partnership should be emphasized more. Another suggestion was that when discussing the partnership level relationships, the key account management process should be mentioned since the process aims for building the partnerships. Additionally, the customer journey map should not be displayed in the operating model as an illustration, but with a sentence that states that these processes aim to improve the customer experience during the end-to-end customer journey.

The supporting functions included organization, information systems, locations and suppliers. A development suggestion to organization included a comment that new organizational structures are not necessarily needed to run these proposed processes, however, in the future an organization for the customer experience and intelligence can be helpful. A comment to information systems included a specification of the communication tools, such as MS Skype and MS Teams which could be utilized in real-time communications with the customer. Additionally, the location where the organization operates was suggested not to be close to customer physically, but instead prefer remote work and support in multi-site co-operation environment. However, it was also mentioned that the services should feel present for the customer. The suppliers of the process were renamed to be the supply chain. The meaning of this change is to have it clearer for the reader what is the purpose of this element. Additionally, some items were added into the
supply chain box. These items were IT providers, subcontractors, near-shoring and off-shoring partners, and material suppliers. These all are part of the supply chain and may affect to the customer experience.

5.3 Building the Proposal

The proposal building stage focuses on a single service context, which is the engineering services delivered as projects. Together with the conceptual framework, the current state analysis outcome, and the findings from data collection 2, a proposal for future state customer care operating model is built.

5.3.1 Defining the Strategy and Objective

The strategy and objective for the new customer care operating model should be driven by the ambition level that is defined in section 4.5, but they should also support the case company strategy, vision and values. The case company corner stones of strategy are growth in customer focus, service solutions and engineering methods which aim for digitalization and international growth. Additionally, the case company vision states that its customers get the best service solutions anywhere at any time. Furthermore, the case company values express how the company does things and how it serves its customers. The values are customer oriented, proactive and attractive. Therefore, the proposal is to have customer care strategy directly linked to the case company strategy and values. An introduction of the strategy and values should be shown in the operating model shortly to keep the direction clear when operating the customer care processes.

The objective of customer care was defined already at decent level in the current way of taking care of customers, but the proposal is to enhance the objective with exceeding the customer expectations and to aim to increased customer loyalty. The new objective should be about meeting and exceeding the customer expectations and ensuring customer value to gain satisfaction and loyalty. When the objective is set as described earlier, the success of the model can be measured with NPS score because it focuses on all these elements while being directly linked to company revenue.

The characteristics of the customer care should also be illustrated in this part of the model. First, the proposal is to be responsive and effortless. Second, the case company
should also be available as agreed, instead of being always available, simply because of optimizing costs and gained value. Additionally, the company should deliver services in agreed quality and build trust while being flexible and innovative at the same time. With these characteristics embedded into the customer care operating model, reaching the objective becomes easier.

5.3.2 Defining the Proactive Activities

The customer care operating model should mainly focus on proactive activities that aim to improve the customer experience during the entire end-to-end customer journey in a proactive way so that all experiences that have negative impact could be avoided before they even occur. The proactive activities can be divided into four categories: ensuring the execution, ensuring quality, ensuring communication and partnership, and business development. The execution activities should include expectations management, risk management, and change management. The quality category should include continuous improvement process and competence development. The communication and partnership activities should include listening and guiding the customer, proactive communication, and building long-term partnerships. Additionally, the business development activities should include upselling and innovation, but also customer experience management.

Expectations management aims to openly discuss what the customer expects from the provider, and to avoid assumptions for example in terms of orders. Expectations management is about communication. For example, a delivery date must often be agreed for service where the customer has their own expectations about the delivery, but so does the provider. These two expectations rarely meet without clear terms for the delivery between the both parties. Therefore, the terms of delivery need to be agreed with good communication so that there remain no assumptions. Additionally, in situations where is a need to re-agree the terms of delivery, for example if the service provider knows that the delivery will be delayed, the expectations need to be pushed back. This means that the delay needs to be communicated and new delivery date must be agreed. With these procedures, the expectations are managed and negative impact on customer experience is minimized.

In this service context, risk management aims to control the probability of an event that would lead to negative customer experience. Risk management could consists of activi-
ties such as identification, evaluation and prioritization of risks. With proper risk management a project can be delivered with more consistent quality and better results, but also without unpleasant surprises. In a situation where new technologies are needed for the service delivery; the risk management becomes even more essential to secure service delivery. By managing technology risks in engineering services delivered as projects, not only the service quality and promised value are delivered, but also the amount of positive customer experience is increased which leads to increased customer satisfaction and loyalty. Additionally, risk management is closely related to change management in a way that usually when there is a risk regarding new technology or ways of working, there is a need for change. Therefore, as important is to have proper change management activities implemented together with the risk management procedures. Change management focuses on communicating the reasons why a change is needed throughout the stakeholders in the change, but it also aims to actively involve different stakeholders to the change process. With good communication during a change project the provider can already have decent results. However, there should be a separate study about how change management should be conducted and lead.

To ensure quality, two processes are proposed. The continuous improvement process which is already in place, and competence development. Continuous improvement process actively seeks better ways of doing things, better ways of working, improved technologies, and improved co-operation practices to mention a few. With continuous improvement of customer related processes, the provider can demonstrate that the service quality is continuously improving, and the customer is cared, but it can also increase trust and add value. On the other hand, competence development program aims to ensure that the provider company has required competencies available whenever the customer needs support in their projects. Having well planned training paths for employees that support the customer future needs and the shared future goals is the first step in competence development. This area of competence development should also be studied in a separate project with more depth about the issue.

Listening and guiding the customer is the first part of ensuring communication and partnership. It is important to listen to the customer reactively, but also providing proactive guidance about future trends and technologies can affect on customer experience in a positive way. The proactive communication means contacting the external and internal customers proactively in case of changes or problems in the service delivery that may affect the customer experience in a negative or positive way. For example, when delayed
deliveries are proactively communicated to the customer, the customer can adjust its own operations and maybe avoid any difficult situations totally, but at least minimize the consequences. Additionally, the proactive communication enables the provider to stay avoid 100% availability because there are not so many unpleasant surprises that may occur for the customer which would lead to a customer service request.

Developing long-term partnerships that aim for shared long-term goals is essential to gain trust between both parties, but also to proactively plan the future and prepare for new challenges in advance. The long-term partnership is also closely connected to the agreed meeting practices and contacting procedures. These reactive processes are mostly determined through the level of partnership that exists between the customer and the service provider. Additionally, long-term relationships allow continuous improvement process to be implemented in an effective manner.

To develop the business, innovation and upselling activities should be included in the model. Customers want the service provider to proactively suggest new offerings for them and expect the provider to be innovative and staying on the edge of new technologies. Therefore, it is fundamental to also focus on new offerings and innovation, to ensure customer satisfaction and loyalty in long-term.

Furthermore, a customer experience management process that aims to systematically improve the customer experience during the entire end-to-end customer journey can be used to achieve the objective of increased customer satisfaction and loyalty. The customer experience management process is the missing piece of the puzzle that can overcome most of the weaknesses identified in section 4.6. The customer experience management process utilizes the findings of complaint solving process, but also all data that is collected with the voice of the customer process. With customer experience management process, the findings of data analysis can be turned into fact-based decisions and improvement initiatives. Additionally, the missing link between the complaint solving process findings and customer journey can be filled. Furthermore, the customer experience management process should also control the voice of the customer process in a way that it supports the entire customer journey concept. The customer experience management process makes sure that relevant data is collected, and that the data is analyzed and used for actions that are implemented into the entire end-to-end customer journey.
5.3.3 Defining the Reactive Activities

Because there is a chance that not every negative customer experience can be avoided, the customer care operating model should include activities that answer and react to any customer problems and issues, but also to maintain continuous dialog with the customer with agreed meeting practices and contacting procedures. These activities are called reactive because of their reactive nature, and not focusing on the proactive side of the processes. The reactive activities can be divided into two parts: ensuring execution and ensuring quality. The execution part should include best practices for customer service, customer specific contacting procedures, customer specific meeting practices that are agreed with the customer. The quality part should include a complaint solving process.

When a difficult situation is faced, best practices for customer service may guide the company representative to right direction and thereby mitigate the negative experience effect as much as possible. These best practices for customer service should include the requirement of being available for the customer during the entire end-to-end customer journey. Whenever there is a question or a problem, the customer should be able to make contact to the provider without effort. Therefore, there should be a single point of contact during the entire journey, and the provider should be always available and responsive. Furthermore, best practices for customer service interactions are needed. The best practices for customer service should include a guideline that instructs how to interact with the customer. Suggested best practices were discussed in section 3.2.3 and they are also listed in Appendix 2.

Additionally, customer specific contacting procedures should be developed. This is because some customers just want their job to be done, and not to be involved too much while doing it. On the other hand, some customers may want as much transparency as possible, and therefore the service provider must proactively contact the customer about any smallest details possible. For these reasons, to achieve great customer experience, customer specific contacting procedures must be established. In engineering services that are delivered as projects, the customer wants to know what’s happening with the project as much as possible. The customer needs information about the project status in terms of agreed KPI’s, schedule, budget and quality continuously. These requirements already define the contacting procedures so that the contacting must be continuous, for example on a daily or weekly basis. In this case, the continuous need for customer contacts can be developed into customer specific and agreed meeting practices, for example
weekly project management meetings that follow the progress of the project and discusses any open issues on a regular basis. However, these two practices may not go in parallel in all service contexts even though the concept fits well into engineering services delivered as projects.

Furthermore, as a complaint solving process is already established, it should be maintained. The process enables reactive collection of customer complaints, investigation of the complaint root causes, and elimination of the issues that the customer has faced. The complaint solving process should first assign a complaint owner and the team members that oversee solving the problem. Additionally, the complaint solving process needs to be connected to the customer experience management process to ensure that the identified issue is eliminated, and the customer experience is improved during the entire end-to-end customer journey with the findings of the problem-solving process.

Additionally, these reactive processes should be implemented with separate project that focuses on change management, but also invests on training the employees. The employees who are in contact with the customer eventually need the customer service skill set to be able to affect the customer experience when the customer is facing any problems or questions.

5.3.4 Defining the Voice of the Customer

The earlier described proactive and reactive activities require reliable insight about the customer to be able to operate efficiently. Therefore, a voice of the customer program should be included in the customer care operating model. The purpose of voice of the customer program is to collect customer data, utilize internal operations knowledge, and make sure that the data is processed and utilized for decision making. The voice of the customer should consist of two parts: customer data collection and data utilization in general. The customer data collection part includes customer surveys, customer feedback collection, customer visit data collection into CRM, customer complaints, non-conformities and claims. The data utilization part should include customer intelligence data analysis process, internal operations KPI utilization and organizational assessment procedures.

The customer surveys can be done with the existing NPS tools to gain the metrics for customer loyalty. However, these NPS surveys should be targeted at situations where
the customer may experience critical moments during their journey. For example, a customer survey should not only be sent after a project, but during a project where we know that is a critical moment, such as a change of personnel or any other significant change in procedures. The feedback that is available right at the time of incident is more valuable to the case company for improvement purposes than a yearly basis general survey. Additionally, as customer feedback is currently collected, it should be continuing but the storing and utilization of that data could be improved with clear process that describes how to operate with the feedback. The customer visit data is already gathered by different users; however, based on the data used in this study, the visit data mainly focuses on new customers. This should be changed to also cover the existing customers and that the visit data would include reports of customer experiences, either positive or negative. Furthermore, as customer complaints handling, non-conformities and claims handling are already described, the operation of these should be continued as it is planned, but as part of the voice of the customer.

To utilize the collected data, a customer intelligence data analysis process should be described in detail. This process must include instructions for storing the customer data, processing the data in a way that it can be utilized, and the analysis of the data for insight that can support decision making. Additionally, the internal KPI’s should be utilized in voice of the customer to be able to proactively communicate about any upcoming challenges, for example in delivery of service. Furthermore, the company should perform organizational assessment to support the customer data results. As the customer may have an opinion how the company is performing, but it may not be enough for identifying the underlying causes for the performance since usually the company employees already know the issues that should be eliminated to ensure stellar customer experience.

5.3.5 Setting the Organization

The earlier described processes require an organization which runs them. The purpose is to have clear roles and responsibilities described and making sure that each of the proposed processes have an owner and assigned resources. The customer care operating model should include assigned customer teams, and a steering group. Additionally, there should be a customer experience and intelligence team, and a customer strategy team. Table 7 shows the roles and responsibilities of an organization that is required for the proposed customer care operating model to operate.
Table 7. Roles and responsibilities of an organization that is required for the proposed customer care operating model to operate.

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Customer Teams</td>
<td>Contacting Procedures</td>
</tr>
<tr>
<td></td>
<td>Meeting Practices</td>
</tr>
<tr>
<td></td>
<td>Customer Service</td>
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<tr>
<td></td>
<td>Complaint Solving Process</td>
</tr>
<tr>
<td></td>
<td>Proactive Communication</td>
</tr>
<tr>
<td></td>
<td>Utilizing Internal Operational KPI's</td>
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<tr>
<td></td>
<td>Risk Management</td>
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<td></td>
<td>Expectations Management</td>
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<td></td>
<td>Change Management</td>
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<tr>
<td></td>
<td>Continuous Improvement</td>
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<tr>
<td></td>
<td>Customer Feedback</td>
</tr>
<tr>
<td></td>
<td>Customer Visit Data</td>
</tr>
<tr>
<td>2 Steering Group</td>
<td>Listening and Guiding the Customer</td>
</tr>
<tr>
<td></td>
<td>Building Long-Term Relationship</td>
</tr>
<tr>
<td></td>
<td>Upselling New Services</td>
</tr>
<tr>
<td></td>
<td>Business Critical Decision Making about Issues and Problems</td>
</tr>
<tr>
<td></td>
<td>Supporting Customer Teams</td>
</tr>
<tr>
<td>3 CXI Team (Customer Experience and Inte-</td>
<td>Customer Data Collection</td>
</tr>
<tr>
<td>lligence Team)</td>
<td>Customer Intelligence Data Analysis Process</td>
</tr>
<tr>
<td></td>
<td>Organizational Assessment</td>
</tr>
<tr>
<td></td>
<td>Customer Experience Management</td>
</tr>
<tr>
<td>4 Customer Care Strategy Team</td>
<td>Prioritizing Customer Experience Improvement Initiatives</td>
</tr>
<tr>
<td></td>
<td>Making Business Critical Decisions Considering Customer Care</td>
</tr>
</tbody>
</table>

As Table 7 shows, the assigned customer teams are responsible of handling the reactive processes such as contacting, meeting the customer as agreed, customer service and complaint solving process. The customer teams also need to emphasize the proactive activities and try to focus on being as proactive as possible to avoid high availability in customer service. Customer team responsibility is also to manage risks, expectations and changes in a proactive manner. These three earlier mentioned proactive activities ensure execution, but it is also important for the customer teams to focus on proactive communication together with following and utilizing the internal operational KPI's during
the project delivery to avoid any unpleasant surprises for the customer. Furthermore, an assigned steering group is also required to support the customer teams. The purpose of the steering group is to listen to the customer, but also to guide the customer into correct direction, for example with future technologies by suggesting and upselling new innovations and services. Planning the future together with the customer is also the responsibility of the steering group. Sharing long-term goals with the customer builds up the partnership and increases trust between the two parties. Additionally, the steering group is a forum in which any escalated business critical issues can be decided.

Since the customer experience need to be managed systematically during the entire end-to-end customer journey, an assigned team for managing the customer experience and intelligence is proposed. A customer experience and intelligence team is responsible for customer data collection and utilization for further development ideas. To shorten the team name, it is called a CXI team (Customer experience and intelligence team). The CXI team plans and sends out the surveys, handles and processes the customer feedback and visit data, as well as the complaints, non-conformities and claims. Furthermore, the team works with the earlier described customer intelligence data analysis process that produces valuable insight about the customer for decision making. Additionally, the CXI team is responsible for performing organizational assessment to gain comparable insight on how the organization is performing. The proactive responsibilities for CXI team should include the managing the customer journey improvement initiatives with customer experience management process which is described in section 3.2.2. To ensure the focus of customer experience improvement initiatives a strategy team should be also established including stakeholders from existing roles within the company. The strategy team should include stakeholders from different units and functions within the company to gain more holistic approach to decision making about which experiences to focus on first. The strategy team should also take care of competence development program in the top level, even though line managers for each employee are responsible for individual training paths and certification of employees.

5.3.6 Defining the Information Systems

The earlier described processes and organization also needs information systems to be effective in operation. Therefore, the proposed operating model should include systems such customer relationship management system (CRM), customer survey tool (NPS), customer portal and real-time communication tools such as Microsoft Skype and Teams.
Additionally, there should be a management system for complaints, claims and non-conformities. Furthermore, KPI dashboard and data analytics tools are required. The CRM enables collection and handling of customer feedback and customer visit information. New guidelines for gathering the data should be created so that the CRM data quality can be improved to support the analysis process in the later stages. With the NPS tool the customer surveys can be sent and collected, but it would also provide metrics about the results for tracking the customer loyalty, and thereby the effectiveness of improvement actions.

The customer portal combined with real-time communication tools such as Microsoft Skype and Teams enable the customer team responsiveness and effortlessness. Additionally, customer complaints, non-conformities and claims could be managed in Microsoft SharePoint solution, as they are currently.

Data analytics tools are also required, and the features of the system are mainly focused on qualitative data analysis since customer feedback is mostly open text comments. The tool should be able to classify the collected data and identify issues that occur often and have the biggest effect on customer experience. The results should be shown in a visual format for easy analysis, and conclusions. Additionally, the company should utilize real time internal operations data, and for that use a KPI dashboard system could be developed.

5.3.7 Description of the Locations

Even though the ambition level was to stay close to the customer, the customer team does not need to stay physically close to the customer. It is enough that the providers services are present for the customer, therefore, remote work and support should be preferred as it would support the company strategy. As the case company has multiple sites around the world in different locations, there could be co-operation between these sites to support the operation. However, despite the global operation of customer care, services should still be delivered in local language to ensure effortless customer experience, if possible.
5.3.8 Defining the Supply Chain

The customer care processes also include so-called supply chain stakeholders that may affect the customer experience during the customer journey. These should also be considered in the new customer care operating model. The supply chain could include the employees who create the customer experience, off-shoring and near-shoring partners, IT providers, subcontractors and material suppliers. The employees are having the largest impact on the customer experience during the customer journey since they are dealing with the offering and services that the case company provide. The services are mostly created by the employees and their competence, but employees also manage the proactive processes, and to ensure proactivity, everyone within the company should support each other and co-operate for improved customer experience. Off-shoring and near-shoring partners, as well as IT service providers, sub-contractors and material suppliers may also affect to the outcome of the service, and the experience perceived by the end-customer. The IT services are present during any interaction with the customer when the work is done remotely, so they play a big role in making the experience as effortless and consistent as possible. They also enable most communicational activities, tools, and feedback collection, which also should be as effortless as possible to maximize the customer data collection and quality of contacts. Any subcontractors and material suppliers should be also managed in terms of customer experience, so that any negative experiences that may occur during the use of these third-party member services can be mitigated.

5.4 Initial Proposal on Customer Care Operating Model

The initial proposal of the Customer care operating model for the future state is shown in Figure 20.
Figure 20. Initial proposal on Customer care operating model for engineering services delivered as projects.
As Figure 20 shows, the initial proposal on Customer care operating model consist of seven elements. The first part includes Values and Strategy, the second part is the Objective. The third element describes the Processes within the arrow. Fourth element is the Organization that operates the processes. Fifth element describes the Information systems that are needed for the organization to operate efficiently. Sixth element describes the Locations where the model is operated, and the seventh element describes the Supply chain of the processes. Within the arrow, there are also Characteristics that describe shortly what the service provider should be like.

The first element of the Customer care operating model includes the Values and Strategy. The proposed values and strategy are directly linked to the case company equivalents so that the customer care operating model would support the company value and strategy. Only the values are shown as text in the proposed model because of the limited amount of space, however, when the model is presented in another format, the strategy can be shown. The values of the customer care operating model are proactive, customer-oriented and attractive. Furthermore, the second element of the model is the Objective, which is an enhanced version of the current objective. As the current objective only focused on meeting customer expectations, and ensuring customer value and satisfaction, the proposal of the new customer care operating model objective is to meet and exceed customer expectations, but also to aim for increased loyalty. Additionally, the provider company Characteristics are proposed to be responsive, available as agreed, effortless, in agreed quality, trustworthy, flexible, and innovative.

The third element describes the proposed customer care Processes that are divided into three categories: the Proactive activities, the Voice of the customer, and the Reactive activities. The Proactive activities include risk management, expectations management, and change management to ensure execution. Additionally, the continuous improvement process and competence development program aim to ensure quality of service. Furthermore, listening and guiding the customer, proactive communication and building long-term partnerships aim to ensure communication and partnership. Lastly, the proactive activities include upselling, innovation and customer experience management that aim for business development. Additionally, the Voice of the customer is divided into two categories, the Customer data collection and data utilization. The Customer data collection includes activities such as customer surveys with NPS, customer feedback, customer visit data, customer complaints, non-conformities and claims. The Data utilization
is recommended to include customer intelligence data analysis process, internal operational KPI utilization, and organizational assessment activities. Furthermore, the Reactive activities should include customer specific contacting procedures and meeting practices, but also best practice guideline for customer service. Additionally, the Reactive activities should include a complaint solving process, from which the improvements are directed to customer experience management that aims to improve the end-to-end customer journey experience.

The fourth element describes the Organization that runs the processes. The Organization should include assigned customer teams, assigned steering group, a customer experience and intelligence team, and a customer care strategy team. Additionally, the organization requires Information systems to operate efficiently, and they are described in the fifth element. The Information systems should support also the processes described in the third element. The information systems that are required are CRM, NPS survey tool, customer portal, Microsoft Skype and Teams, data analytics tools and KPI dashboard. Additionally, there should be a management system solution for complaints, claims and non-conformities.

The sixth and seventh elements are the Locations, and the Supply chain. The Locations element describes that the services should be present for the customer, but not physically close. Also, remote work and support is recommended as well as multi-site work and co-operation. Additionally, services should be available in local language if possible. The Supply chain describes that employees create the customer experience, but also any off-shoring and near-shoring partners should be considered as part of the supply chain. Furthermore, the IT service providers, subcontractors, and material suppliers need to be considered as part of the supply chain to the customer care processes.

Summing up, the model is quite comprehensive, but so is the ambition level. The model is a proposal for the future state, and its level of operation does not need to be reached immediately. The initial proposal is now defined and see next section for validation of the proposal.
6 Validation of the Proposal

This section reports on the results of the validation stage and points to further developments to the initial proposal.

6.1 Overview of the Validation Stage

This section validates and seeks for development ideas on the initial proposal developed in section 5. The initial proposal was validated with key stakeholder feedback and evaluation of the initial proposal. The key stakeholder feedback and evaluation is conducted with one to one interview through skype meetings. The interview is structured in a way that the interviewee was first reminded of the goal and contents of this stage, and the current state analysis findings. Then the initial proposal was introduced for the interviewee, and the feedback and evaluation were collected. In total three interviews were conducted with different organizational levels of the case company organization, see section 2.3 for data collection plan.

6.2 Findings of Data Collection 3

This section discusses the findings of data collection 3. The findings of data collection 3 are shown in Table 8.

Table 8. Key stakeholder suggestions for validating and improving the initial proposal on customer care operating model.

<table>
<thead>
<tr>
<th>Element of Initial Proposal</th>
<th>Suggestions from key stakeholder</th>
<th>Description of the suggestion</th>
</tr>
</thead>
</table>
| 1 Strategy, Objective and Characteristics | a) We should only aim to exceed customer expectations.  
  | b) Change “In Agreed Quality” to “Quality”. | Remove the “meet” word from customer expectations because if we want to gain loyalty, we should exceed the customer expectations and it’s not enough just to meet them. (Informant 21)  
<p>| | The characteristic currently about delivering in agreed quality seems not to fit in. This should be changed to word “Quality” instead for more descriptive word that emphasizes how we look in the customer’s eyes. (Informant 21) |</p>
<table>
<thead>
<tr>
<th></th>
<th>Proactive Activities</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>2</td>
<td>a) We should focus on change management in projects.</td>
<td></td>
<td>It is important that both parties are openly communicating about changes for example how change of plans affects to the costs. Easily the work is just done without calculating the cost of changes and this can cause unpleasant surprises. (Informant 20)</td>
</tr>
<tr>
<td></td>
<td>b) We should emphasize communication and innovativeness.</td>
<td></td>
<td>It is important to communicate about changes, but also to guide the customer to correct direction. Emphasize this. Also, the customer expects us to innovate, and with that we can gain trust. (Informant 21)</td>
</tr>
<tr>
<td></td>
<td>c) We should have first time right -trainings and training for new technologies.</td>
<td></td>
<td>The “first time right” philosophy should be trained to our employees, but also ensure that new technologies are trained. (Informant 22)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Reactive Activities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>a) How do we divide the best practices within the company for further use?</td>
<td></td>
<td>The complaint solving process indicates as an arrow that the improvements should be shared to other projects as well, so how can this be ensured. (Informant 21)</td>
</tr>
<tr>
<td></td>
<td>b) We should agree about contacting procedures.</td>
<td></td>
<td>We should not be too much in contact to the customer because they are also busy, but rather contact in a proper rhythm, something like 50/50 rule could work. It means that in some cases customer contacts us, and we propose contact like 50% of the time. (Informant 22)</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th></th>
<th>Voice of the Customer</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>4</td>
<td>a) Collect feedback about the service in general.</td>
<td></td>
<td>We should collect data about our service in general, and maybe not to focus too much on projects that are small in budget. But in general, this is a good idea. (Informant 20)</td>
</tr>
<tr>
<td></td>
<td>b) Feedback, complaints, non-conformities and claims could be combined to one box.</td>
<td></td>
<td>The current data collection includes a lot of things, some might be forgotten by mistake. Maybe combine the customer data to one sentence. However, it is important to have process for analyzing the collected data. (Informant 21)</td>
</tr>
<tr>
<td></td>
<td>c) Internal KPI’s are important.</td>
<td></td>
<td>The internal KPI’s should be also used to exceed our own expectations, which would eventually show to customer as exceeding their expectations. (Informant 21)</td>
</tr>
<tr>
<td></td>
<td>d) We should have standard internal KPI’s that are easy to use.</td>
<td></td>
<td>The internal KPI’s should be standardized in ERP, and automatically shown to everyone involved in the project. Customer also wants to see the KPI’s. (Informant 22)</td>
</tr>
<tr>
<td></td>
<td>e) The organizational assessment is important.</td>
<td></td>
<td>Not every customer wants to spend time on our surveys or feedback questionnaires, therefore, it is important to evaluate ourselves to get the focus points for improvement. Also, the customer expects us to solve our problems ourselves. (Informant 22)</td>
</tr>
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<table>
<thead>
<tr>
<th></th>
<th>Organization</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>5</td>
<td>a) The CXI team tasks could be performed in customer teams.</td>
<td></td>
<td>There does not necessarily need to be separate team for CXI, because the customer teams could do the tasks. (Informant 21)</td>
</tr>
<tr>
<td></td>
<td>Information Systems</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>6</td>
<td><strong>b)</strong> We could decrease the amount of customer care teams.</td>
<td>For big customers this initial proposal may work, but for smaller accounts the organization can be smaller. (Informant 22)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>a)</strong> How to ensure that feedback is recorded into CRM.</td>
<td>There are many different tools described in the model, so how can we make sure that the data is recorded to correct place and that people remember to record it. Also, the CRM should be in focus, and as the main tool for customer care data. (Informant 20)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>b)</strong> Could all customer data be handled within CRM?</td>
<td>It would be good to have one place for all customer related data, for example CRM or Customer Portal. There could be all schedules for meetings, and any checkpoints related data within one system. (Informant 21)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>c)</strong> The CRM should be a mobile version.</td>
<td>The CRM should be a mobile version to lower the barrier for entering more data into the system about customer meetings and visits. (Informant 22)</td>
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<table>
<thead>
<tr>
<th></th>
<th>Locations</th>
<th></th>
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<tbody>
<tr>
<td>7</td>
<td><strong>a)</strong> We might not be able to promise local language.</td>
<td>The locations box is otherwise ok, but we might have to remove the “service in local language” item because we have also native English speaker people working for us, so not always possible to deliver local language. This might limit too much the operations. (Informant 20)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>b)</strong> The services should be available for the customer from any location.</td>
<td>Change the sentence of “services present for the customer” to having the services available for the customer at any location. We should utilize our global organization. (Informant 21)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>c)</strong> Change “Services in local language”.</td>
<td>Change the local language in services to “if required by customer, services in local language” because our company language is English. (Informant 21)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>d)</strong> The locations box could be next to the organization box on the bottom.</td>
<td>Move the location box next to organization, and the information systems to the top. This helps the reader to understand where the organization is operating more clearly. (Informant 21)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>e)</strong> The customer wants same resources for their most of their projects.</td>
<td>The customer always must train the resources for their products, and therefore they want to have same resources for their projects to avoid re-training too much. Therefore, the multi-site work may become an obstacle. (Informant 22)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>f)</strong> Our company language is English and it should stay that way.</td>
<td>The company language should be English in all functions, because it makes our job much more effortless and efficient. (Informant 22)</td>
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<thead>
<tr>
<th></th>
<th>Supply Chain</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td><strong>a)</strong> Employees in contact to customer are creating the company image.</td>
<td>The “who” word could be removed from the supply chain box since it is everyone in contact to customer creating the image of the com-</td>
<td></td>
</tr>
</tbody>
</table>
As Table 8 shows, there are quite many improvement proposals and change requests that can be considered as input for development for initial proposal. The objective should focus only on exceeding customer expectation and is suggested to be changed to another (Informant 21). No improvement proposals were given to proactive activities; however, the reactive activities should consider describing how the best practice is shared to another projects (Informant 21). The voice of the customer is recommended to only focus on feedback of general level services (Informant 20). Additionally, the multiple methods for collecting customer data is suggested to be combined into shorter description in the model (Informant 21). Another suggestion is that there does not necessarily need to be new customer experience and intelligence team, but instead the current customer teams could handle their tasks (Informant 21). Few suggestions regarding information systems were given, these included a question how to make sure that all data is remembered to be stored into the systems (Informant 20), and if all customer data could be handled within one system (Informant 21), for example CRM. Additionally, the locations “box” could be moved to be presented next to the organization “box” in the model (Informant 21). Also, promising that we deliver services in local language might be too big of a promise, so it could be removed (Informant 20, 21). The services should be available for the customer; therefore, a name change for this is suggested (Informant 21). Finally, in the supply chain element, the “who” word could be removed because everyone in contact with the customer creates the customer experience (Informant 21).

6.3 Developments to the Proposal Based on Findings of Data Collection 3

The development suggestions of data collection 3 are analyzed and used for further development of the initial proposal in this section.

6.3.1 Developing the Strategy and Objective

Based on the feedback and development ideas from data collection 3, the strategy is kept as it was in the initial proposal. However, the suggestion from Informant 21 to change the objective on exceeding customer expectations instead of just meeting the expectations can be implemented, because that way loyalty can be increased even more. Additionally, the characteristic “in agreed quality” was suggested to be changed to...
“quality” by Informant 21, and this is a valid point because all the other describe the company in similar way with adjectives, so “quality” word fits into the model better among others.

6.3.2 Developing the Proactive Activities

As Table 8 shows, the development suggestions to proactive activities were not mentioned. The interviewees only emphasized the importance of change management (Informant 20), communication and innovativeness (Informant 21), and they were already implemented into the initial proposal. Additionally, it was mentioned that there should be training for “first-time right” thinking, and for new technologies (Informant 22). However, these suggestions are included in the competence development element that was already mentioned in the initial proposal. Therefore, the initial proposal should stay as it is considering proactive activities.

6.3.3 Developing the Reactive Activities

A development suggestion considering the reactive activities included a question about how to make sure that the best practices that have been figured out during the complaint solving process, can be shared to other projects as well in a systematic way (Informant 21). This is something that should be carefully planned, and it is not currently in the scope of this thesis. However, this can be mentioned for actions in future. Additionally, some emphasis was put on the importance of agreeing contacting procedures in a way that it fits the customer requirements (Informant 22). This suggestion is also already covered in the initial proposal.

6.3.4 Developing the Voice of the Customer

The development suggestions to the voice of the customer were focusing on collecting feedback in general level about the service (Informant 20) and combining the many aspects of customer data collection for easier visualization (Informant 21). The feedback collection only on general level about the service may be applicable to some extent, however, the study argues that detailed feedback should be collected also during all projects, and especially in the end of a project as a lesson learned practice. Additionally, the suggestion from Informant 21 to combine data collection methods for visualization
purposes is also valid suggestion, however, it may not describe clearly enough the message that the customer care operating model aims to deliver in this one-page format. Therefore, these two suggestions are not implemented to the final proposal. Furthermore, the internal KPI’s were seen as an important part of the voice of the customer (Informant 21), however, the KPI’s should be as effortless to generate and use as possible, and therefore some automation regarding the KPI’s should be planned regarding the enterprise resource planning system for example (Informant 22). The development suggestions regarding internal KPI’s are valid and can be implemented into the final version of the customer care operating model.

6.3.5 Developing the Organization

The organization element in the operating model was suggested to be modified in a way that it is not necessary to have a separate team for customer experience and intelligence, but instead the customer teams could handle these tasks (Informant 21). Additionally, Informant 22 argues that the initial proposal could work in big accounts, but for smaller accounts the organization can be smaller. The study agrees that the customer experience and intelligence management can be done with the existing resources, however, the quality of work may suffer. Additionally, the customer teams have many other responsibilities also, and therefore to ensure a stellar customer experience during the entire end-to-end customer journey, a separate unit is recommended. Thus, the development suggestion is not implemented into the final proposal of the customer care operating model.

6.3.6 Developing the Information Systems

The information system suggestions included a question how to ensure that employees remember to record all customer data into the systems (Informant 20) and if all data could be combined into just one tool, for example CRM (Informant 21). Additionally, Informant 22 suggests that there should be a mobile application for CRM to make the customer contact and visit data collection more effortless. These suggestions are valid improvement suggestions that could be managed with the new operating model. The proposal for reminding about customer data collection requires training and instructions. Therefore, the way to operate must be trained to all employees performing data collection activities. However, this procedure will not be shown in the one-page operating model in
detail. Additionally, in terms of the suggestion of using one tool for customer data collection, this is also something that needs more investigation, because the capabilities of CRM systems are not known, and therefore this suggestion might not be implementable. As an idea, this is a goal to aim for, and could be investigated in other study. The suggestions considering a mobile application for the current CRM is from the researcher’s point of view doable and should be implemented in the final proposal of the customer care operating model. However, the two ideas: training and one tool for customer data as such are not ready to be modified into the final proposal to the customer operating model because they require more investigation.

6.3.7 Developing the Locations

The locations element included a preference to serve the customer in local language. The language requirement was suggested to be removed because it might cause difficulties for the operative organization as a default setting (Informant 20 & 22), however, it could be changed to “if required by customer” (Informant 21). As such the development idea is valid and the final proposal will be changed accordingly. Additionally, a suggestion to change the name “services present for the customer” to “services available for the customer at any location” would be more understandable (Informant 21), and this change can be done accordingly. Furthermore, it was recommended to move the locations element next to the organization in the bottom (Informant 21). This suggestion is logical and can be supported in the final proposal. Additionally, it is worth to mention that the customer usually wants the same resources in repeating projects to avoid re-training the resources to their products. Therefore, the multi-site works is problematic if re-training for the customer products is required (Informant 22). As such this suggestion is valid, but it will only remain as a suggestion for the final proposal, since multi-site work and co-operation is preferred by the company.

6.3.8 Developing the Supply Chain

To the supply chain element there was a recommendation to change the phrasing. The phrasing was recommended to be changed to “Employees in customer contact create the customer experience” (Informant 21). However, the study argues that customer experience can be affected also indirectly without contact to the customer, and therefore the phrasing should be changed, but to “Employees in customer contact create customer experience (directly or indirectly).
6.4 Final Proposal

Based on the feedback and development suggestions in data collection 3, the final proposal is made. The final proposal on Customer care operating model for engineering services delivered as projects is shown in Figure 21.
Figure 21. Final proposal on the Customer care operating model for engineering services delivered as projects.
As Figure 21 shows, the final proposal on the Customer care operating model includes seven elements; *Values and Strategy, Processes, Characteristics and Objective, Organization, Locations, Information systems, and Supply chain.*

The first element of the Customer care operating model describes the *Strategy and Values* which are set to directly support the company strategy and values. The values are proactive, customer oriented and attractive, whereas the strategy is based on the company corner stones of strategy that are growth in customer focus, service solutions and engineering methods which aim for digitalization and international growth. The second element of the Customer care operating model describes the *Characteristics and Objective*. The Objective is to exceed customer expectations and ensure value to gain satisfaction and loyalty. On the other hand, the Characteristics are responsive, available as agreed, effortless, quality, trustworthy, flexible and innovative.

The third element of the Customer care operating model describes the *Processes*, which are divided into three categories: the Proactive activities, the Voice of the customer, and the Reactive activities. There, the case company should put efforts onto the following.

*The Proactive activities* include four types of activities which aim to Ensure execution, Quality, Communication and Partnership, but also Business development. Related to the *Ensuring execution*, the company should have risk management, expectation management and change management activities to proactively ensure execution. Each of these three activities aim to avoid unpleasant surprises for the customer by managing any risks that are related to the project, or ensuring that both party expectations meet each other, and communicate and manage any changes proactively that may affect the customer experience negatively. In relation to *Ensuring quality*, the case company should perform continuous improvement activities, but also focus on competence development. By doing continuous improvement, the quality can be consistently improved, and the customer will face fewer negative experiences related to low quality. Additionally, with a competence development program, the case company can focus on meeting the customer expectations in terms of competence, and therefore avoid negative experiences during execution of service in the customer journey. Related to the *Ensuring communication and partnership* part, the case company should focus on listening, but also guiding the customer in terms of future possibilities. Additionally, the proactive communication concerning any changes or smallest details that may affect customer experience must be emphasized. Also, the case company should aim to build long-term partnerships, and the current key
account management process is a good tool for focusing on this issue. Additionally, *the Business development* part should include upselling and innovation, because the customer always expects the case company to deliver new ideas and solutions that improve current ways to doing things. Furthermore, the business development part also includes a customer experience management process that could at least once a year together with yearly account planning take place and look back at the customer journey during the previous year, and then select the focus points for improvement for the upcoming year within that specific account.

The third element of the Customer care operating model also describes *the Voice of the customer* which is the data collection and utilization element that aims to understand the customer behavior, but also all the elements that may affect the customer experience during their entire end-to-end customer journey. The Voice of the customer is divided into two parts, the Customer data collection and the Data utilization. *The Customer data collection* part describes what kind of data from the customer is collected and with which methods. The customer data should be collected with customer surveys (NPS), customer feedback, customer visit data, customer complaints, non-conformities and claims. *The Data utilization* part should include a customer intelligence data analysis process which describes where the data is stored and how it should be handled and analyzed in a way that the data can be transferred to a format that can be used to support decision making. Additionally, the data utilization includes internal operational KPI’s that should be used for proactively gaining knowledge on issues that may affect the customer experience in near future. Furthermore, the case company should also focus on organizational assessment because not all customers want to participate in the feedback and evaluation processes, and therefore the internal knowledge on what is going well and what is not should be utilized as well.

The third element of the Customer care operating model also describes *the Reactive activities*. The element is divided into two parts as well: Ensuring execution and Ensuring quality. *The Ensuring execution* part includes customer specific contacting procedures, customer specific meeting practices and best practice guidelines for customer service. *The customer specific contacting procedures and meeting practices* should be agreed and documented together with the customer to serve the customer’s best interest and needs during their journey. Some customers want to have intensive continuous dialog about progress and any smallest details, but some just want to focus on their own core business while outsourcing the non-core business to others, and just receive the results
as an outcome. Therefore, it is important to agree on these contacting and meeting practices for each customer separately. Additionally, the Ensuring quality part relates to the complaint solving process that should be connected to the customer experience management process in the proactive activities. All the results of solved complaints should be shared to other projects, and the improvements should be proactively embedded into the customer journey. The Customer care processes, proactive, reactive and Voice of the customer that were described earlier aim at ensuring a positive customer experience during end-to-end customer journey.

The fourth element of the Customer care operating model is the Organization. An organization is needed to operate the Customer care Processes. The customer care organization should include assigned customer teams, assigned steering groups, customer experience and intelligence team (CXI), and a customer care strategy team. The customer teams are in close contact to the customer, and manage the reactive activities such as contacting procedures, meeting practices and best practice for customer service, but also the customer feedback, visit data, and complaints. The customer teams also need to ensure execution proactively with risk management, expectations management and change management activities while proactively communicating with the customer. The customer teams also must ensure communication by listening and guiding the customer, but also participating in building the long-term relationships and performing continuous improvement actions. The steering group purpose is to assist the customer teams in issues that require more business-critical decision making, but also to help with building long-term relationships with shared long-term goals. The customer experience and intelligence team (CXI) is managing the voice of the customer program and the customer experience process. The CXI team collects customer data of surveys and manages non-conformities and claims, but also is responsible for performing the organizational assessment. The CXI team also owns the customer intelligence data analysis process and maintains the operational KPI dashboard. Additionally, the CXI team is responsible for the complaint solving process improvements that need to be embedded into the entire customer journey. Furthermore, the customer care strategy team consists of managers from different organizational units within the case company, and it supports the CXI team in prioritizing the improvement initiatives and setting the focus of improvement in the future.

The fifth element of the Customer care operating model is the Locations. The Locations describe where the organization and services are operating and delivered. The services
should be available for the customer from any location, but they do not need to be physically close to the customer. Therefore, remote work and support is preferred, and multi-site work and co-operation is promoted. The case company has functional units globally, and this benefit should be utilized to full potential. Additionally, the customer can be serviced in local language if the customer requests it.

The sixth element of the Customer care operating model is the Information Systems. The Information systems describe all the IT tools that are required for the organization to work efficiently and effectively. The Information systems include a CRM, CRM Mobile, NPS survey tool, customer portal, MS Skype, MS Teams, data analytics tool, KPI dashboard and a management system solution for claims, non-conformities, and complaints. All other systems are already operative in the case company except the data analytics tool, CRM Mobile, and KPI dashboard. The data analytics tool should be able to classify and analyze qualitative data because most of the customer data that is collected is qualitative open text feedback that need to be systematically processes to understand what the main issues on hand are. Additionally, the CRM mobile is a mobile application version of the current CRM platform that the case company is using. The mobile application may lower the barrier to enter customer visit data into the system, because it can be done immediately after the visit during the traveling for example. Another new system is a KPI dashboard that should show real-time results on ongoing projects about actual costs, and estimated deliveries and costs for the customer. The internal KPI data could be recorded in to the ERP of the case company by each employee at the end of the day together with working times, and the KPI dashboard is used as a tool for showing this data in a visualized and usable format in real time.

The seventh element of the Customer care operating model is the Supply chain. The Supply chain element describes other items that may affect the customer experience, and the outcomes of the processes. The Supply chain elements are also an input to the Processes, and therefore, they need to be noted in the Customer care operating model. The Supply chain elements include any employees that are in contact to the customer directly, or indirectly, because they create the customer experience. The Supply chain also includes off-shoring and near-shoring partners, such as global sites and offices that can be utilized in the projects for additional resources. Also, the Supply chain includes IT services providers, subcontractors and material suppliers.
7 Conclusions

This section consists of the executive summary of the thesis and next steps and recommendations towards implementation. The section ends with thesis evaluation and closing words.

7.1 Executive Summary

The objective of the thesis was to propose a customer care operating model for the case company in service business, and to focus the proposal on one service context to have better understanding on how the case company should take care of its customers. The customer care operating model is needed in the company as a basis for further development and defining the customer care processes in more detail. As the company is operating in the service business, it aims at increased growth through introducing a more systematic way of taking care of its customers.

The study was conducted by first looking for relevant knowledge from literature, then conducting the current state analysis of the current ways of customer care, and continuing based on the identified results to the co-creation of the new customer care operating model with the key company stakeholders. The end part of the study included validation of the proposed model within the case organization. These research steps were grounded in three rounds of data collection, such as analysis of the internal documents and interviews, and also key stakeholder workshops.

Based on the exploration of relevant existing knowledge, the study built the conceptual framework that selected and merged together the most suitable tools and best practice for building operating models, ideas on excellent customer care, and tools for customer journey mapping from literature. The synthesized theoretical construct (the conceptual framework) was merged from such elements as the operating model canvas, including such elements such as strategy and objective, processes, organization, information systems, locations and suppliers; and also the tools for customer journey mapping, focusing on customer’s doings, thinking and feelings during the customer journey. This synthesized construct was used to guide the analysis of the current state in the case company.

The current state analysis revealed two main findings: the lack of systematically improving the customer experience during the entire customer journey, but also the inefficient
way of utilizing the customer data that is already collected. However, the ambition level of the case company in terms of customer care was identified to be high. The current state analysis was based on 9 internal interviews, company documentation, customer survey data, and customer visit data. The current state analysis also scrutinized and mapped the customer journey in three different service contexts: the consultancy, the projects and continuous services.

Based on these results, the initial proposal for the new customer care operating model was built. The initial proposal focused only on one service context which is Engineering services delivered as projects, and it included a definition of the customer care operating model in relation to strategy and values, characteristics and objective, processes, organization, information systems, locations and supply chain. The proposal was built in three workshops included and grounded in key stakeholder input, also in relation to the customer journeys.

This initial proposal was validated by seeking improvement suggestions and feedback from key stakeholders. The feedback related to the customer care operating model objective, locations and information systems. The feedback was used to develop the final proposal on customer care operating model for engineering services delivered as projects.

The final validated proposal on customer care operating model for engineering services delivered as projects consists of seven elements: the strategy and values, characteristics and objective, the processes, the organization, locations, information systems and the supply chain. First, the strategy and values are directly linked to the case company equivalents. Second, the characteristics are responsive, available as agreed, effortless, quality, trustworthy, flexible and innovative, with the goal is to exceed customer expectations and ensure value to gain satisfaction and loyalty. Third, the processes include proactive activities, voice of the customer and reactive activities, but the focus is on proactive activities to avoid having to focus too much on the reactive activities. The voice of the customer focuses on the customer data collection and utilization to support the proactive activities. Additionally, the processes require an organization and locations to be operative, and therefore the initial proposal includes a proposal of establishing and maintaining customer teams, steering groups, customer experience and intelligence team and a customer care strategy team. However, the organization is not required to be physically close to the customer, but to have services available for the customer from any location.
and utilizing the multi-site work and co-operation. Furthermore, all required information systems were described to have the organization and processes operating efficiently and effectively. Additionally, the supply chain was defined, so that all other relevant stakeholders and input to the processes are recognized that may affect the customer experience.

Based on the study, it was demonstrated that, for a company that pursues growth, it is fundamental to take care of the existing and new customers of the company. When all the customers are taken good care by exceeding customer expectations and ensuring value, the customer satisfaction and loyalty is increased, which leads to increased positive word of mouth, and eventually to increased customer base and revenue. The proposed customer care operating model could serve as the link between the company strategy and operative activities that enables the growth if implemented at all organizational units and levels.

7.2 Next Steps and Recommendations toward Implementation

Since the thesis focused on high level concepts, and only described the surface of the elements introduced in the customer care operating model, there were also identified the next steps and recommendations that could be taken into account for implementation.

First, the final proposal only focuses on one service context, but customer care should be conducted in every service context within the case company, and therefore the final proposal on customer care operating model should be defined for other service contexts as well. Second, detailed process descriptions should be created for each process element within the final proposal. Third, all the responsibilities and processes shown in the operating model should be communicated and trained for the employees before implementation. Fourth, the proposed organizational changes and establishing of a customer experience and intelligence team can be started after all processes are described. Fifth, the CRM mobile application availability should be investigated, and the development or deployment started, including the investigations for the possibility of harmonizing of all customer data to CRM for easier access to relevant customer information. Sixth, an internal study for purchasing and building a data analytics tool and a KPI dashboard can be initiated to help with the data analysis process and real-time information on internal KPI's.
Additionally, the customer care visualization in the case company management systems is recommended to be changed to illustrate that the customer care should be conducted during the entire customer journey, rather than a reactive process as it is currently. Furthermore, the customer care operating model can be shown as a one-page version in the case company management system, however, it is recommended to first document the process descriptions to have more detailed information and clear responsibilities available on each of the element included in the final proposal. Also, the customer care operating model is designed to be the tool for managers for planning the operations.

7.3 Thesis Evaluation

The outcome of the thesis addresses the objective and produces an outcome of the customer care operating model with short descriptions of each element included. However, due to the limitations of the thesis, the description of each of the element is only presented on top level, and not described comprehensively and in detail even though that would be required for daily operative use. Additionally, the operating model was developed based on a rather small amount of opinions from the customer point of view, whereas a more deep-down customer point of view could have been collected for analysing and further development. Therefore, more customer interviews could have been conducted, maybe even workshops that the customer participates in.

As required by research practice, the outcome, the results and conclusions of a thesis should be reliable and credible (Kananen 2013:176). This thesis is evaluated by credibility and also by relevance. Credibility is a combination of validity, which is about researching the correct issues on hand, and reliability, which is about having consistent research results (Kananen 2013:176). In qualitative research, credibility can be achieved through a combination of multiple observers, theories, methods and data source, as this approach overcomes the intrinsic bias that a single-method or single-theory study would have (Denzin N.K., 1970:315).

In this study, Credibility was ensured by having multiple approaches to data collection such as interviews, survey results, documents, and workshops. The study also used multiple data sources, such as multiple informants from different viewpoints and different documents. The interview reliability was guaranteed with recordings and questionnaires, which were shared with the stakeholders for later use. The researcher's own bias was avoided by facilitating the interviews, and data collection in the preliminary research,
rather than steering them. However, a few workshops were held, in which the researcher together with the steering group developed the initial proposal for customer care operating model. There was triangulation for the interview results on customer journey mapping, which means that the initial results were iterated with two additional stakeholder groups to confirm the data validity. In addition, the study has multiple perspectives when approaching the conceptual framework, so called existing knowledge. The conceptual framework was created from multiple different and reliable sources, by combining the best ideas from the experienced people.

Also, this study placed a special focus on ensuring Relevance to the case organization mainly by two actions; by choosing the development objective clearly in the beginning of the project with the stakeholders involved, and by having the continuous support and control from the case company organization during the entire thesis. A steering group was established ensuring that the researcher focuses on relevant issues during the thesis and followed the progress throughout the thesis. The objective was triangulated with three iterative rounds, and the objective was followed regularly during the thesis. The follow-up was arranged with monthly steering group meetings, where the researcher presents current progress and any possible issues for the group to evaluate and solve.

7.4 Closing Words

Any company that is in the service business and aims for increased growth needs to take care of their customers, therefore a systematic way of taking care of the customer is required to result in positive word of mouth and loyalty. A customer care operating model usually exists in every successful company; however, they may be implicit. This was the case in the studied company, and the purpose of this study was to create a documented and visualized customer care operating model that is supported with an outside-in view. The thesis delivered a proposal for taking care of customers which should help to address the earlier described issue, but also tools are introduced for continuing the work in other contexts. Together with the thesis outcome and employee training, the case company can start to take care of the company customers systematically to achieve increased positive word of mouth, and customer loyalty. Thereby, the customers spread more positive word of mouth and return to the provider for more services which leads to increased growth and revenue. The researcher is looking forward to participating in this change.
References


Campbell, A. (2017) *Target Operating Model: The world's best introduction to operating model design*. Ashridge Executive Education. [https://www.youtube.com/watch?v=Y09_nmsAX6o](https://www.youtube.com/watch?v=Y09_nmsAX6o)


## Research Interview (Discussion)

### Information about the informant (Interview 1)

<table>
<thead>
<tr>
<th>Details</th>
<th>Informant 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name (code) of the informant</strong></td>
<td>Informant 1</td>
</tr>
<tr>
<td><strong>Position in the case company</strong></td>
<td>-</td>
</tr>
<tr>
<td><strong>Date of the interview</strong></td>
<td>30.1.2019</td>
</tr>
<tr>
<td><strong>Duration of the interview</strong></td>
<td>60min</td>
</tr>
<tr>
<td><strong>Document</strong></td>
<td>Field notes</td>
</tr>
</tbody>
</table>

**Field notes** **Phase 1** – 15min

<table>
<thead>
<tr>
<th>Main question</th>
<th>Aiding/helpful questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>0</strong> What is your role and responsibilities currently, and how have you been involved in customer care?</td>
<td></td>
</tr>
<tr>
<td><strong>1</strong> How is the company taking care of their customer’s currently?</td>
<td>Please describe:</td>
</tr>
<tr>
<td></td>
<td>• What steps does the process have? Is it documented?</td>
</tr>
<tr>
<td></td>
<td>• How often/how do we approach the customer?</td>
</tr>
<tr>
<td></td>
<td>• Through which channels?</td>
</tr>
<tr>
<td><strong>2</strong> What kind of organization do we have for the customer care?</td>
<td>Please describe:</td>
</tr>
<tr>
<td></td>
<td>• Who are involved? Suppliers &amp; Partners?</td>
</tr>
<tr>
<td></td>
<td>• Organization &amp; Locations</td>
</tr>
<tr>
<td></td>
<td>• Roles and responsibilities</td>
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<tr>
<td></td>
<td>• Capabilities</td>
</tr>
<tr>
<td></td>
<td>• Decision making</td>
</tr>
<tr>
<td><strong>3</strong> How/What data do we gather about the customer?</td>
<td>Please describe:</td>
</tr>
<tr>
<td></td>
<td>• Feedback?</td>
</tr>
<tr>
<td></td>
<td>• Contact Data?</td>
</tr>
<tr>
<td></td>
<td>• With what tools?</td>
</tr>
<tr>
<td></td>
<td>• Where is the data stored?</td>
</tr>
<tr>
<td><strong>4</strong> How would you describe excellent customer care?</td>
<td>Any previous experiences or feedback may guide with this one</td>
</tr>
<tr>
<td></td>
<td>How good do we want to be at customer care?</td>
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<td>---</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>• Availability</td>
</tr>
<tr>
<td></td>
<td>• Accessible</td>
</tr>
</tbody>
</table>

Field notes - **Phase 2** – 45min

<table>
<thead>
<tr>
<th></th>
<th>Topic(s) of the interview</th>
<th>QUESTIONS</th>
<th>FIELD NOTES</th>
</tr>
</thead>
</table>
| 1 | Choose a specific case example in which the customer journey is mapped | Let us focus on one specific case example you have been involved in.  
  (Think about a case example before the interview, try to choose a typical case that is familiar to you) | | |
|   |                           | • What is the case example about?  
• What is your role in it?  
• Are we able to focus on the entire journey or just a part of it? | | |
| 2 | Sketching the journey into a pre-selected template | Whose journey are we mapping?  
• List all customer stakeholders (buyer, influencer and user)  
Where does the journey start and end?  
• What is the sales cycle?  
What are the journey stages?  
• What are the touchpoints & communication channels? | | |
| 3 | Thinking of what happens in the touchpoints mainly from the customer point of view, but also thinking who are involved from the company side and how are we doing at each stage. | Customer Activities  
• What are the customer’s tasks to be done at each stage?  
• What is the customer doing/behaving at each stage?  
• What kind of interaction is it? (Where/When)  
• What do they expect?  
Customer Emotions & Thinkings  
• What is the customer thinking and feeling at each stage?  
Company Stakeholders  
• Which company stakeholders are involved at each stage?  
• Where do we succeed/fail?  
• What are the moments of truth?  
• What are the pain points? | | |
## Ten Principles for Great Customer Experiences

Watkinson (2013)

<table>
<thead>
<tr>
<th>Principle</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly reflect the customers identity</td>
<td>• Reinforce self-image and resonate with personal values</td>
</tr>
</tbody>
</table>
| Satisfy our higher objectives | • Wants and needs are derivative  
• Getting the experience right at service level |
| Leave nothing to chance | • Consistent and smooth journeys  
• Plan and design every interaction |
| Set and meet expectations | • Existing expectations, learnt behaviors and associations are criteria that customers use for judging. |
| Experiences are effortless | • Interactions that soak customers time and energy are quickly put off or replaced with less demanding.  
• Few things generate more goodwill and repeat business than being effortless to deal with. |
| Experiences are stress free | • Avoid stressful situations  
• Eliminate confusion, uncertainty and anxiety. |
| Indulge the senses | • Delight the senses e.g. with delicious food, relaxing music or beautiful painting. |
| Socially engaging | • Cultivating personal relationships with customers.  
• We more readily buy from a friend than a stranger. |
| Put the customer in control | • We want to do things our own time, our own way  
• We appreciate experiences that are flexible, accommodating and leave us feeling in control. |
| Consider emotions | • Evaluating emotional aspect of an experience brings unconsidered issues to the surface and opens new ways to delight the customer. |
## Thirteen Principles of Great Customer Service

<table>
<thead>
<tr>
<th>Principle</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendliness, Darlington (2018:59)</td>
<td>Customer service starts with a smile</td>
</tr>
<tr>
<td>Showing respect, Darlington (2018:59)</td>
<td>Never let your emotions to overtake</td>
</tr>
<tr>
<td>Listening, Darlington (2018:59)</td>
<td>Watch for signs, for example the tone of voice</td>
</tr>
</tbody>
</table>
| Responsiveness, Darlington (2018:59) | Respond quickly to all comments and concerns  
|                                   | Some response is better than none.                                                                                                          |
| Asking feedback, Darlington (2018:59) | Ask how customer thinks and feels about the service                                                                                         |
| Agreeability, Brown (2014:24-26)  | Customers want to hear “Yes” more often than “No”. At least tell them that you will “See what you can do”.                                   |
| Adaptability, Brown (2014:24-26)  | Customers desires are changing constantly, make sure to keep up.                                                                              |
| Avoiding transfer, Dixon (2018:85-89) | Collaborate in real-time with your team to solve problems on first contact.                                                                    |
| Show empathy and understanding, Cook (2011:13) | Ask about the problem and show empathy and understanding to reassure taut feelings.                                                           |
| Keep promises, Cook (2011:17-18)  | Always keep to promises  
|                                   | Dont guarantee things you cannot deliver                                                                                                      |
| Set expectations, Cook (2011:17-18) | Often company can set expectations, such as “We will cet back to you 9-11am tomorrow”.                                                         |
| Gain trust, Cook (2011:19)        | Customers want to deal with people who they can trust.                                                                                       |
Customer journey map for a fictitious company that focuses on positive and negative emotions
(Kalbach 2016:97, Original from www.macadamin.com, used with permission)
Customer Care Organization

(Amended from Walker Information 2013)