Section 1: Inside the Small/Medium Business Customer's head

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I t is unlikely that current customer perceptions for what is possible online will change if
Acme continues to define **Customer Service** as categories of activities supported by
CSRs in the offline environment like bill payment, trouble tickets, and address change.

The current customer mindset does not align with some of our key business objectives, like
call deflection. Nor does the customer express and experience aligned with our past and
present branding efforts like "Advanced Simplicity," "Getting Life Done," or "Making
Progress Every Day."

We will not alter customers' sense that interacting with the phone company is difficult or
cumbersome simply by moving what customers perceive to be complex interactions onto
the website. This certainly will not alter their perception that we are more than just the
xxxxxxxx company.

So, who are our Small/Medium Business customers? What do they do? What is their
mindset? What do they want from an online experience?

Inside the Small/Medium Business Customer's head

1. Attitudinal and emotional drivers of our Small/Medium Business customers as people

Small Business Owner	
Goal-Oriented	Small business customer want to achieve and maintain a state of flow: enhancing flow is good, hindering flow is bad
Accountable	Expect to be treated like they treat their customers
Controlling	Demand perception of control, options, and choices
Identity is the Company	Owner's feel the company is a form of self expression; therefore company image is personal image
Visual	Motivated by Visual Evidence
Responsible	Decide what is right or wrong, don't delegate
Proactive	They take the initiative and make fast decisions
Advertising generates awareness only, and does not motivate purchase	

Non-Owners	
Reactive	They are responsible for maintaining stability, not moving company forward

Deferential	They defer to others for direction and decision making; look outside for affirmation
Externally Validated	What other think matters, primarily concerned with how others feel, especially about negative reactions
* Advertising generates awareness only, and does not motivate purchase	

2. Attitudinal and emotional drivers of our Small/Medium Business customers as organizations:

Organizations	
Medium Progressives	- Reduce-Distractions (enhance flow)
High Innovators	- Seek technology to maximize productivity

3. Perceptions

- Website is highly correlated to perception of company; the visual design of the site impacts customers' evaluation of the vendor as a whole (reliable, stable, experienced, current, etc.)

- Interactions with Company X as complicated and time consuming that usually requires live help from a rep.—replicating these interactions online with reinforce this perception.

- Their interactions with Company X as being based on necessity

- Company X is strong in technology, but weak in everything else

- Interactions with Company X are neither purely self-serve nor purely assisted service, but rather as combination of the two depending on complexity and urgency.

- There is a strong distinction between gathering information, analyzing information and acting on information (in other words, purchasing)

- Interactions with Company X are not consistent with how things "should be" online

- Irrelevant information is noise, and noise hinders use. *"If information is relevant to me, information, if not, its noise., and I already have plenty of noise to deal with"*

- High value Small/Medium Business customer view Company X most negatively and feel that we are no well suited to advise on or provide high speed data and internet solution, with 33% of respondents claiming that this is primarily because of poor customer service

4. Expectations

- They are successful because they provide their customers with superior service—they expect the same from their suppliers.

- The degree to which xxxxxxxxxxxx in integrated into their business will affect the expectations they have of their provider: low integration means xxxxxxx is a utility and they will want a minimal relationship; high integration means xxxxxxxx is a business tool and will want a consultancy relationship.

- They expect their xxxxxxxxxxx providers will offer tools relevant to support decision-making.

- They don't expect to have to re-educate each rep they speak with—once they give Company X information, they expect everyone in the company to know it.

- While they will use self-service channels, they do expect the ability to seamlessly switch to assisted modes of interaction (phone rep) when the activities become too complex

- They expect to save an average of 20% with a bundle versus the cost of individual elements

5. Preferences

- They prefer to deal with one supplier—and although Company X is one name, we do not behave like a single supplier

- They prefer to do business where they have or have developed a personal relationship: "*I don't choose a vendor as much as I choose the people that work there.*"

- They want to be in control of the relationship, or at least the current interaction

- Most use websites as an information-gathering tool, and will use only those websites they feel are useful (not to be confused with usable).

- They are still entrenched in a paper culture and prefer to read and, more importantly, share information on paper.

6. Reactions

- A business relationship begins when a provider demonstrates that they are willing and able to understand the customer's particular expectations, needs and desires. *"I feel so much better about my relationship with the Company when they actually recognize me as a small business owner."*

- They do not trust the non-technical information we present to them: *"If I got information from CompanyX.com I would end-up having to do additional research elsewhere to validate it…my assumption is that it would either be marketing-related or not enough to really answer my question."*

- They respond well to facts and comparisons and have learned to filter the many sales pitches aimed at business customers—they learn to trust sources of facts and distrust sources of sales pitches *"as a small business, I want help and consultation, not a sales pitch."*

- While they prefer personal service, they understand the service constraints on a large company like Company X and will often be satisfied with self-service if and only if they feel it is faster and gives them more control than picking up a phone

- Without a satisfactory online experience for the basics (order, repair, billing, product information (better, not more, info and filtering tools)) they won't look to Verizon.com for anything that goes beyond the basics

- Nearly half of Small/Medium Business customers are NOT motivated by bundled packages

Inside the Small/Medium Business customer's self-reported activities

Activities Performed Reported by Customers	
Repair	- Recognizing and diagnosing problems - Trouble Shooting - Figuring out who to contact - Communicating issue or problem - Coordinating time - Tracking and seeking resolution status - Getting feedback about resolution
Ordering	- Assessing and validating needs

	- Researching solutions - Comparing functions, features, costs - Comparing current solution with others - Making decision - Placing order
Billing	- Receiving - Reviewing, tracking trends - Hand-off to others in office - Coding to ledger - Dissecting plans and expenses - Disputing - Storing - Paying - Managing internal usage rules
Knowledge Building	- Figuring out what prods/servs are in place - Researching prods and industry trends - Contacting members of information network - Assimilating information - Discussing knowledge in office - Collecting and using printed materials - Contacting providers customer service

Categories of Interactions	
Maintaining	These are the minimum interactions, and are necessary to sustain the current level of service provided, like viewing the bill
Learning	Gathering information about products and services, both pushing and pulling information; these interactions are more likely to occur when customers become aware of a personal or business need, but are not concerned about a repair crisis
Acting	These interactions are part of affecting service in some way, for example, initiating a repair, solving a billing problem, or ordering/altering service
Monitoring	Interactions that ensure that the actions taken are in effected in properly
Customers describe these categories as interdependent and cyclical	

Self-Serve Activities the Small/Medium Biz Customer Expects

- Reporting and tracking problems
- Troubleshooting
- Doing research, information gathering
- Advice (as opposed to marketing promotions)
- Comparing products and services
- Monitoring their account
- Managing their account
- Managing their products and services

Observations of the Small/Medium Business customer's work environment

- There is a continual need for up-to-date information about the status of individuals at the company, current phone status and the status of active jobs.

- The receptionist was the central hub of communications in the office. .

- We found that many communications sessions are followed by another session like another phone call, fax or email.

- There was lots of multi-tasking by all employees.

- Companies have many shared resources such as computers, fax machines, printers and phones.

- Many of the work environments observed were fairly noisy.

- We found that there is relatively little remote data access happening now – and that there is no driving need for more extensive data access from remote locations.

- Many businesses maintain multiple voice messaging accounts.

- The use of industry-specific software is very common.

- Some of these offices are running many different platforms

Things We Don't Know

- Why do customers come to CompanyX.com in the first place
- What do they do on the site
- What compels return visits
- Satisfaction levels (have they satisfied their reasons for coming)

- Qualification of satisfactions (how well have they satisfied their reasons for coming)
- General online usage patterns (how use of CompanyX.com differs)
- Levels of technological sophistication
- Can anything we do on the site actually impact retention?
- What online tools, if any, do they rely on?
- Where does CompanyX.com fall short of their expectations?
- Simplicity or Completeness?

Design Recommendations/Guidelines

1. Functionality/Offerings

- Simplify, simplify, simplify
- Show customers how we can make them feel and look bigger
- Provide evidence of benefits customers can print or drop into ppt for group decisions
- Support information filtering, rather than dumping information on them or forcing them to decide what they want before we give it to them
- Give them greater control, or perception of greater control, over their services online
- Help the Small/Medium Business customer:
    - Assess and diagnose situations
    - Gather, filter and interpret information
    - Establish accountability and a tangible connection with us
    - Get timely responses and feedback
    - Communicate and track telecom issues
- Offer give-a-ways to motivate low-end Small/Medium Business; business benefits for high-end
- Could we implement some kind of peer-to-peer knowledge sharing? Will we have the political stomach to deal with the potential flood of negativity that folks might share?? If we moderate it will lose all credibility and be ignored
- Use quick codes, and make sure all material printed from the site prominently displays the quick code to go directly to functionality related to information

2. Visual Design

- Simplify, simplify, simplify
- Make it personal—put people in the site (not just pictures of people)
- Show customers upfront that we understand them and their unique situations
- Make it easy for customers to visually identify themselves on the site
- Get rid of irrelevant information—it is just noise and discourages use
- Make layout easy to scan—people don't read the web
- Make information visual

- Make the online experience more current, and show the customer that we are leading technology rather then trying to catch up to it
- Show don't tell (they are visual, and don't read online)

3. **Information Architecture**

- Simplify, simplify, simplify
- IA should be goal-oriented and support this online behavior—get people to their goal faster
- Support information filtering, rather than dumping information on them or forcing them to decide what they want before we give it to them
- Design the site with the customer as the structural core, rather than with our LOBs as the structure core
- Provide them information the way they want to see it (not the way we want to publish it)
- Consider the customer's goals first, and CompanyX's goals second
- Make visual structure easy to scan—people decide where to click by looking, then they move their mouse
- Get rid of irrelevant information—it is just noise and discourages use
- Use quick codes, and make sure all material printed from the site prominently displays the quick code to go directly to functionality related to information

4. **Experience**

- Simplify, simplify, simplify
- Make it personal
- Show customers that we understand them as businesses
- Provide them information the way they want to see it (not the way we want to publish it)
- Support information filtering, rather than dumping information on them or forcing them to decide what they want before we give it to them
- Make advertising about information rather than promotion
- Give customers a reason to return, integrate site's functionality into their flow
- Make the online experience more current, and show the customer that we are leading technology rather then trying to catch up to it
- Demonstrate how they will get better service online than over the phone
- Show don't tell (they are visual, and don't read online)
- Give them control, or perception of control, or their services online
- Show customers upfront that we understand them and their unique situations
- Provide them some sense of control over their own problems and relationship with us
- One size does not fit all, and we will have to make CompanyX.com customize itself for its users (the dimensions of customer segmentation will be difficult to define and

must not rely exclusively on our quantitative telecom-expenditure-centric market segmentation scheme)

- The website must focus on problem solving in order to become a valuable tool for customers
- The site should be goal-oriented—get people to their goal faster
- Consider the customer's goals first, and CompanyX's goals second
- Online and offline channels must provide a seamless experience
- No testimonials, perhaps a few real case studies of particular implementations of problem solutions
- Put them in control by keeping them informed and in command of every issue
- Use quick codes, and make sure all material printed from the site prominently displays the quick code to go directly to functionality related to information
- Ensure contextual relevance—The customer is the context
- Get rid of irrelevant information—it is just noise and discourages use
- No repeated requests for information (save confirming identity) across channels

5. Our Processes

- Reps need training on CompanyX.com
- Make online transactions visible to reps
- No repeated requests for information (save confirming identity) across channels