anecdote

complexity . narrative . knowledge

How to align your brand promises with your customer service using business narratives

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"Man will occasionally stumble over the truth, but usually manages to pick himself up, walk over or around it, and carry on." —*Winston Churchill*

Summary

This paper describes a process for closing the gap between an organisation's brand promises and its customer service—what Stewart and Barlow call Branded Customer Service (2004). The approach recognises the complexity inherent in the cultural change required, and is based on collecting stories from customers and staff. These stories form the basis for identifying what is really happening, and provide the material for decision-makers and designers to design interventions appropriate to the issues discovered.

Brands are valuable and under attack from within

There is no doubt that strong brands are valuable. They demand higher prices, create better stock prices, are more likely to elicit a purchase, and return purchases, and attract great employees who stay longer. (Barlow and Stewart 2004: 32-34)

But, like trust, brands take time to build, yet can be destroyed in an instant. Take this instance of how customer experience contradicts the brand message:

> "Dave … saw an ad by Tweeter that emphasized its staff's "boatload of knowledge". He needed a minidisk player and walked into a Tweeter HiFi Buys store wanting to take advantage of that knowledge. "Hi, I want to buy a minidisk player and accessories if someone can show me how to use it." He was told, "I don't know how it's used, but they're supposed to be really easy." Dave says, "The boatload of knowledge just capsized." (Barlow and Stewart 2004: 49)

Imagine this situation being played out in your organisation hundreds, if not thousands of times. The result is a total undermining of your brand position, a position in which you have invested heavily and which you are pinning the future of the company on.

So how often does this type of situation occur in your organisation? And when it happens, what do your customers think? Will they buy or recommend your product in the future? "Brands deliver customers; being on-brand keeps them coming back." (Barlow and Stewart 2004: 41)

At any particular time you need to know two things regarding your brand and your customer service: how far is your customer service 'off-brand' right now, and how can you find out what is really happening?

Stories provide real insight in complex situations

Traditional discovery techniques, such as interviews, surveys and focus groups, exhibit weaknesses which make them inadequate tools in truly complex environments involving people's deeply held beliefs and feelings.

Take interviews and surveys, which display the following limitations:

- interview and survey questions assume the validity of a hypothesis (it is difficult to develop the survey questions without a hypothesis)—but with the hypothesis stated, interviewers tend to find what they are looking for;

- interviewees rationalise their answers when asked for their opinions—the messiness of their day-to-day activities are quickly tidied-up to provide neat answers;

- interviewees provide the answers that are on the top of their minds—they only know what they know in the context of a specific need to take some action; and

- survey and interview questions provide minimal context—how many times have you answered a survey and found yourself thinking: 'It depends…'?

Add to these weaknesses the complications of attempting to discover things that interviewees believe might land them in trouble, and the techniques of traditional interviews and surveys fall short in helping you size up the situation.

Marketing professionals have known for some time the power of collecting stories. Dupont collected stories about women's thoughts on wearing panty hose, and eventually discovered (after first hearing disdain expressed about these garments) that wearing panty hose made women feel more sensual, sexy and attractive to men.

Dupont modified its brand image to match these feelings. Kimberly-Clark collected stories from parents who were toilet training their children, and discovered tremendous stress associated with having children 'still in nappies'. Pull-ups were introduced, and a new $400 million per year market segment was born. (Leiber 1997)

In both cases the marketeers understood that they were unlikely to discover the telling factors through formal interviews and focus groups. Stories, on the other hand, provided a natural way of expressing what was actually happening. It provided the context required to get at the heart of the issue.

This paper describes how you can use stories collected from customers and staff to determine whether your customer service matches your brand promise, and use these insights to develop interventions to close the gap.

Sizing up the situation: customer and staff views

There are two broad perspectives to consider when assessing the state of branded customer service: how clients view your customer services, and how staff view your brand.

Both views have multiple truths depending on whom you talk to and the purpose of the discussion. In fact, when there are so many interacting parts (the variety of staff, customers, management, locations, products and services, suppliers), it is impossible to determine a single right or wrong solution. Rather, people need tools to make sense of what is going on, develop a common understanding of it, and an agreed direction for action. These activities should be undertaken in the full knowledge that it is impossible to predict in detail the outcomes. There must be a readiness, therefore, to fine tune, redirect or even reverse the actual outcome when it presents itself. This messiness *is* the reality of working in complex environments and we must learn to thrive here. The world is only going to get more connected, faster and more diverse: that is, more complex. To assume we can control the outcome in this environment is treating the system as if it were a machine—an invalid metaphor for the 21st century business.

The challenge is fourfold:

- discover how customers perceive your service;
- discover how staff perceive the company's brand;
- make sense of those discoveries and understand the gap; and
- design interventions that take account of the complex nature of the task.

Discovering how customers view your service compared to your brand promise

Customer stories are descriptions of real-world experiences from the customer's perspective. These stories, typically unpolished and messy, are recorded and transcribed. Here is an example:

> My good friends, Don and Brenda, were flying with a well known airline from Canberra to Darwin. They do a lot of travel, flying overseas every year for holidays. Sadly Don had a heart attack on the plane and died mid-flight. The cabin staff did everything they could for Brenda. Well, after the funeral and things started to settle down, Brenda wrote a letter to the airline thanking the cabin staff for their help and efforts. It was a heartfelt letter describing all the trips they had with that airline and how they flew with them in the 60's when they moved from the US to Australia.

> The reply letter said something like: Dear Don, thank you for your kind words and we hope to see you flying again with us soon. The letter was addressed to poor Don who died on the flight! It was obvious Brenda's letter was just categorised as a 'positive comment' letter and the reply was the stock standard 'positive comment' reply.

The airline's brand conveys a promise of premium service, long-haul capabilities and safety, but the letter conveyed a message of corporate detachment. Here is a good example of 'off-brand' customer service.

Stories of this kind can be collected using a range of techniques. One particularly effective technique is an anecdote circle. Anecdote circles were pioneered and published by IBM's Cynefin Centre, and a practical description is recently available (Callahan 2004). Anecdote

circles are a group of people (no more than ten) who share their experiences, in this case, interacting with your company. It differs from a focus group in that the emphasis is on retelling actual experiences, anecdotes and examples, rather than seeking opinions or judgements. The retelling of stories creates an important dynamic: hearing the stories of others reminds participants of their own stories. It is similar to a stimulating discussion at a dinner party. The anecdote circle is recorded, transcribed, and the anecdotes extracted for a workshop designed to distil key themes.

The customer stories form a rich base of material from which to understand how closely your service matches your brand promise. By immersing company decision-makers in the stories, patterns emerge that reflect what customers are experiencing. The next step is to understand how your staff view, in practice, the company's brand.

Discovering how your staff view your brand

Customer service stories told by your staff provide another valuable perspective on how your brand is being reinforced or undermined. These stories are revealing, like all stories, because they link events in a way that, for the staff, has meaning—it is difficult to retell a story without understanding what the story means. Statements and opinions, however, are much easier to retell without either fully understanding or believing them. Stories, therefore, provide a truer picture in terms of how a situation is perceived.

The stories are collected in the same way as customer stories. Yet the simple act of collection signals to the organisation that a change has begun. Consequently, this discovery phase must also be viewed as an intervention in itself. The organisation begins to change as soon as the first anecdote circles are conducted. Staff hear the stories of their colleagues and begin to appreciate the wealth of experience which they may not previously have had time to recognise or tap into. The aim is to align the brand promise with how staff deliver customer service. This is a change management exercise, and eliciting anecdotes kicks off the process in a positive way.

It is important to avoid asking direct questions when eliciting anecdotes. If we ask staff a direct question such

as, "What does the company brand represent?" we are likely to receive a set of predictable responses based on the marketing department's last communication about what the brand represents. Likewise you would never ask, "When have you delivered 'off-brand' service?" as you are likely to receive a terse, 'Never!'

Crafting effective questions starts with the facilitator painting a picture of activities which might occur while delivering customer service, followed by asking them to recall their own situations, without directly referring to the brand. Creating a scenario helps people remember stories. For example, if the brand positions the company as having superior product knowledge, questions might be around the theme of learning or education: "Think about the last time product training was provided. This might have been done onsite or away from the store. When have you felt excited, or perhaps underwhelmed, by what you learned?" Notice the use of emotive words like 'underwhelmed' and 'excited'. These also help people remember specific incidents.

The collected anecdotes rarely fail to reveal aspects of people's approach to their work that would never be revealed using formal interview and survey methods.

Now you have these anecdotes, what do you do next?

Making sense of narrative

Many aspects of branded customer service are complex. The challenge for those responsible for ensuring that customer service is aligned with brand promises is the ability to detect what is happening now, achieve agreement on the nature of the current state of affairs, and then apply the right techniques to improve the situation. This process starts with the decision- makers and designers coming together to gain a common understanding of what is going on, based on the narratives collected in the discovery phase. We call this process sensemaking.

The first step is to distil meaning from the body of narrative. Here we use a process called narrative representation (Snowden 2001) which extracts archetypes, values and themes from the anecdotes. The archetypes represent various aspects of the culture. In our case there will be archetypes from the customer and the staff perspectives. The values indicate the core qualities that

are considered worthwhile or desirable, again portrayed from two perspectives. The themes describe the issues or topics identified in the stories. Archetypes, values and themes provide new insights and building blocks for interventions.

There is no single, accurate reality in these complex situations. Consequently, sensemaking aims to develop a common understanding and purpose among those involved in enhancing the system. An important step is understanding the nature of the issues or themes discovered from the narrative. Here we use the Cynefin framework as the primary sensemaking tool.

The Cynefin framework was designed to assist people in organisations to construct a common understanding of the nature of the issue they were facing (Snowden 2002). The framework consists of five domains, with the titles: known, knowable, complex, chaos and disorder.

Complex
Cause and effect coherent in retrospect, repeat accidentally

Knowable
Cause and effect separated over time and space but repeat

Chaos
No cause and effect relationships generally perceivable

Known
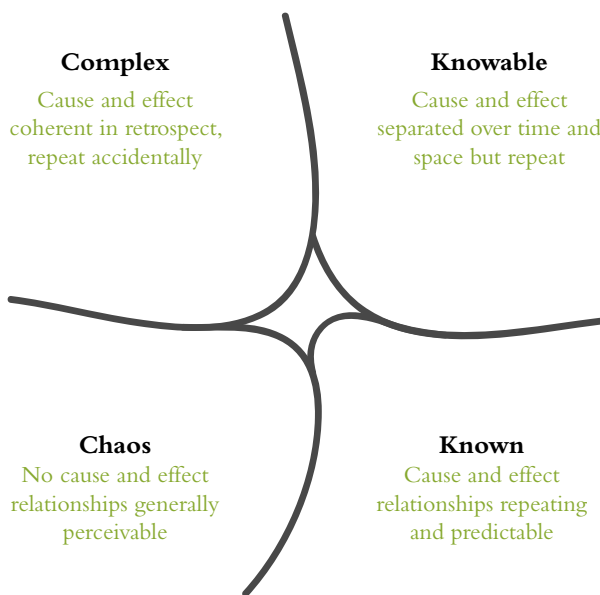Cause and effect relationships repeating and predictable

Figure 1: The Cynefin Framework

The **known** domain represents those issues that the *group perceives* as highly predictable. For example, if an employee turns up to work and conducts himself properly, it is reasonable to expect the employee will be paid. The cause and effect relationship between performing work and being paid is 'known'.

The **knowable** domain represents issues which require some effort—usually in the form of analysis—to determine the relationship between the causes and the eventual outcome. Once this relationship is established, a solution designer can set to work to solve the problem. Engineering solutions typically reside in the knowable domain.

The known and knowable domains are said to be *'ordered'* views of the world. Issues in these domains are amenable to a reductionist approach to developing a solution. A majority of organisations, it seems, view most issues as if they were ordered.

Contrasting with the ordered perspective is what Kurtz and Snowden (2003: 464) call the *'un-ordered'*—phenomena in which order exists without a 'director or designer … in control but which emerges through the interaction of many entities'. While this description seems to apply primarily to the complex domain (below), Kurtz and Snowden include both the complex and chaos domains in un-order.

The **complex** domain represents issues where the cause and effect relationships are intertwined and outcomes only make sense in hindsight. The horrendous bushfires that hit Canberra, Australia in 2003 provide a good example of a complex phenomenon, taking into account all those affected and those who responded to the disaster (the fire itself might be better understood as chaotic). Before the fire hit Canberra, there were very few warnings that such an event might occur. The very day after the fire, residents were presented with a string of 'talking heads' on television accusing organisations of not doing enough, insufficient available fire trucks, poor coordination, lack of back-burning in the forests, etc. Of course there had been no way of predicting how the fire was going to unfold— there were just too many factors to consider.

A complex system appears—in retrospect—just like one that is knowable. This sets a trap for unsuspecting solution designers: after an event occurs they think the system is knowable and so set about tackling the next similar event, expecting it to behave like the first, only to find that the system morphs slightly but significantly into something similar but not the same. For this reason, we call these complex issues 'intractable'. It is difficult to gain traction using ordered techniques.

The **chaos** domain is where humans are unable to perceive *any* relationship between cause and effect. Patterns are indiscernible. True chaos is encountered in organisations when an entirely novel and potentially catastrophic circumstance is presented. In recent corporate history, this would include the Enron collapse, National Australia Bank traders scandal and James Hardie's unforeseen asbestos compensation obligations. Of course, chaos can occur on any scale in an organisation.

It is important to note that the term 'chaos' is not used here as we use it in the vernacular, meaning things are a real mess. Rather, it means that it is impossible to discern patterns and the only choice is to do *something*, in the hope that the action will create new patterns that will help the organisation move toward a solution.

The fifth domain in the centre of the framework is called **disorder**. It represents those issues where the participants cannot decide the issue's nature.

The Cynefin framework is primarily used in a workshop setting where groups of people place issues or themes on to the framework according to how they think a solution to the issue would be characterised—is it known, knowable, complex or chaos? The act of placing issues on the framework generates discussion and develops the group's common understanding of the issue. When consensus is developed over the nature of the issues, the group can move to intervention design.

Designing interventions

Of course, the question now is, what do you do with results of categorising your themes and issues using the Cynefin framework? The most important outcome is designing projects/interventions according to the nature of the problem being faced. If the issue is known, then search for a best practice and apply it. If the problem is knowable, investigate, analyse, search for good practices, and apply them.

However, the complex domain requires a quite different approach. It is important to design small interventions and monitor the results, which are largely unpredictable. It is like navigating a sailing boat across a rough sea. You set a course and then take stock of your current location—which is never quite where you expect it to be—before

setting your next course. If your course is heading in the same direction as you roughly intend, then it is a successful intervention. If, however, the intervention results in a course which heads in the wrong direction, you must quickly intervene to correct the error. The following diagram illustrates this idea.
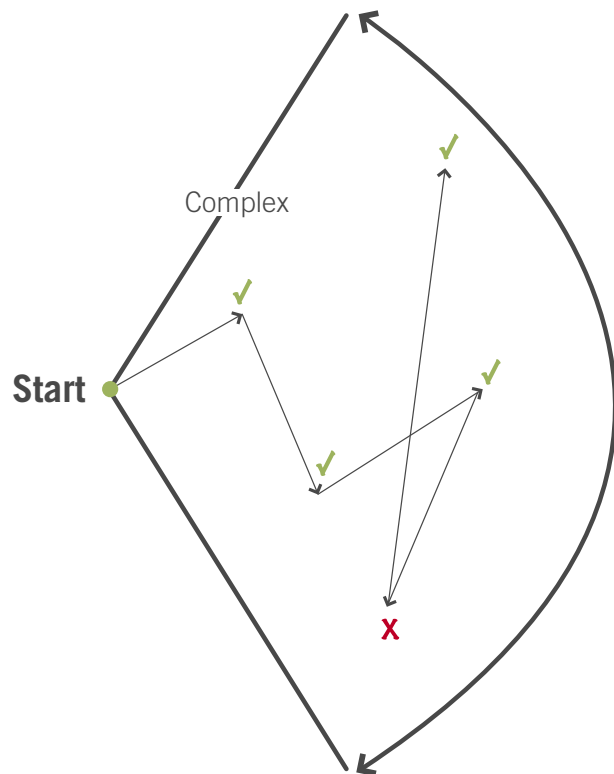

Figure 2: The course of multiple interventions in a complex environment

It is important to remember that each complex issue is unpredictable. Therefore, whenever an intervention is implemented, monitoring is critical in order to observe the patterns that emerge. Unwanted patterns (those contrary to the organisation's intentions) must then be disrupted, and beneficial outcomes must be nurtured. In dealing with complex issues, no end-point is ever reached.

Next steps

As you can see, this is not a recipe book approach. Decision-makers and designers can use this process of discovery, sensemaking and intervention design to really think through and act in ways appropriate to the issues as hand. Bringing customer service closer in line with brand promises is a culture-change challenge and one where you are operating in the complex domain. New methods are required and a combination of narrative and complexity-based design is ideally suited to this intricate task.

At the end of this process, you have a set of interventions which will help close the gap. Of course each organisation and setting is different, and any attempt to list, for example, the top five activities you should undertake to align customer service with brand promise would be a total nonsense. What this paper has set out is the high level process. The details of how to undertake each step can be learned by working with Anecdote on a specific project.

As a first step, locate someone to mentor you through this process. It is important to avoid having outsiders do the work for you because they are ill-equipped to understand and respond to the many nuances of behaviour which will undoubtedly be displayed during the process. Form a core team of people who are interested in using these techniques, and have your mentor train you in how to collect narrative, undertake a sensemaking workshop and learn the best ways to design complexity-based interventions. Then roll up your sleeves and get those stories. This step alone will provide you with a wealth of insights. Effort is then needed to develop a common understanding and an agreed way forward, which is the job of sensemaking and intervention design.

About the author

Shawn Callahan is the principal of Anecdote Pty Ltd, a management consulting firm based in Melbourne, Australia. Shawn specialises in help organisations harness their tacit knowledge using techniques derived from complexity, narrative, and knowledge management. If you have comments or questions about this paper, please contact Shawn at shawn@anecdote.com.au.

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