


# Customer Experience and Product Instructions

**Why product instructions make a profound impact on customer experience**



**Solving post-sales customer experience problems**

Anthrobytes Consulting  
sharon@anthrobytes.com



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[www.anthrobytes.com](http://www.anthrobytes.com)  
+1-951-369-8590



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## Customer experience and product instructions

Many customer experience professionals and technical communication professionals don't talk to each other. As a result, customer experience doesn't think about product instructions; technical communication professionals don't think about the customer experience.

But these fields are important to each other, as this white paper shows. Each field has something to offer the other. While not an extensive dive into customer experience and product instructions, this white paper introduces some concepts and ideas from both fields.

## More products are commodities

At this point in time, most products that do the same thing do the same thing. For example, most cell phones do the same stuff. Most cell phone companies do the same stuff. Most products are commodities, in that they all do the same stuff.

So how do we as business people differentiate our products? How do we make the case that dealing with us is better than dealing with our competition?

The experience a customer has with a company—how easy or hard it is to interact with a company across all touchpoint—is the differentiator for most companies, given that products are generally commodities. And that's what customer experience looks at.

Touchpoints include:

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**Customer churn is one of the most expensive things your company can do.**

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- getting a human on the phone
- using the website
- solving issues
- using the product(s)
- understanding letters or other communication from the company
- understanding the product line(s)
- and so much more

All these customer touchpoint are potentially fraught with poor experiences. And poor experiences make it easier for customers to go to the competition where they may get a better experience. They may not, but they will leave because of a poor experience with your company.

### **Customer churn and customer acquisition cost (CAC)**

And that brings us to customer churn and customer acquisition cost. Customer churn is when customers leave your company and go to another company instead. When a customer leaves, all the money your company spent acquiring that customer is wasted (from your point of view).

For example, it costs your company \$100 to acquire a customer (customer acquisition cost) and you expect your customer to spend \$50 a month, every month for the next year. So for your \$100, you can expect to bring in \$600 of revenue. A great return on your investment.

But, if you blow the customer experience, your customer leaves, taking what ever money they didn't give you yet with them. And your competitor gets that money. Say the customer leaves at the 6 month mark - that's only \$300 you got from that customer. That means your expected income for the year from that customer is only half of what you planned. You have to get another customer in the door - fast - to make that up.

That's expensive. In fact, customer churn is one of the most expensive things you can have in your company.





## The cost of having customers

Let's look at resell and incremental spending and how they impact the company bottom line.

### Incremental spending

Incremental spending is when your customers like your product(s) or services so much, they buy more.

This is a good thing for many reasons, but it's especially good in terms of dollars for two reasons:

1. Higher lifetime value
2. Cheaper customers

Higher life time value means the customers stay engaged with you and continue to spend money with you. The longer you can keep a customer, the more that customer is worth to you in dollars. That's called the Customer Lifetime Value (CLTV).

For example, I've been with the same cell phone company for the last 15 years. They should love me, as my lifetime value to them is in the 10s of thousands of dollars. I would expect them to be my best friend.

Why should they be my best friend? Because I'm cheap to them. They don't need to spend any marketing or sales dollars to keep me. Year after year, I give them \$XX dollars and they make no effort to get it, except to keep the cell network alive, which they don't do for me specially. I'm the perfect customer from their point of view. My CLTV is very high.

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**“An average company loses between 10-30% of its customers annually”**  
- McKinsey

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When you have a high customer churn rate, every customer costs a lot to get and to keep. The goal is to pay to get people in the tent and then keep them there, spending money every month/year/some period of time.

*The probability of selling to an existing customer is 60 – 70%. The probability of selling [more stuff] to a new prospect is 5-20% – Marketing Metrics*

### The experience is important

My experience with my cell phone provider is not always puppies and cupcakes but it's also not at all bad. Generally, they do what I need done quickly and efficiently. Unless someone gives me a compelling reason - such as a dramatic reduction in price and identical coverage - I'm probably theirs for life.

*A 2% increase in customer retention has the same effect as decreasing costs by 10% – Leading on the Edge of Chaos, Emmet Murphy & Mark Murphy*

This is why looking at the total customer experience matters. All touchpoint matter to the customer.

### Three levels of happiness

Craig Menzie talks about the three levels of customer happiness: Meets Needs, Easy, and Enjoyable. Think of it as a pyramid, he says:

*“First, and the base of the pyramid, is that an experience must meet a customer’s core needs. Next, it must be easy for them to accomplish their goals. And last, and most difficult, the experience should be enjoyable. If an experience isn’t inherently something that actually can be enjoyable -- think renewing your car insurance -- then the top of the pyramid is about creating delight from an experience that could be really awful.”*

My cell phone company certainly Meets my Needs, when I need to interact with them, they typically make it Easy. occasionally, when my rep can play with me in the store, it's Enjoyable.

With this pyramid in mind, and the CLTV in mind, you see how the further up your company can move, the more your customers value increases.





## **And this applies to our products, too**

So how do we make our products enjoyable? Because one of our biggest touchpoints with our customers is the products.

Obviously, we need to build products that meet the need. But that's not enough, given that most products are commodities. How do we move our customers to the top of that pyramid? How do we control the customer experience when we're not there to herd them up the pyramid?

One of the ways to do that is quality product instructions. Product instructions are a big (and frequent) touchpoint and no one in Customer Experience is looking at them.

Customer experience is looking at support centers and making those pleasant touchpoints (which is important), but what if we can get people to help themselves before they call the expensive support center?

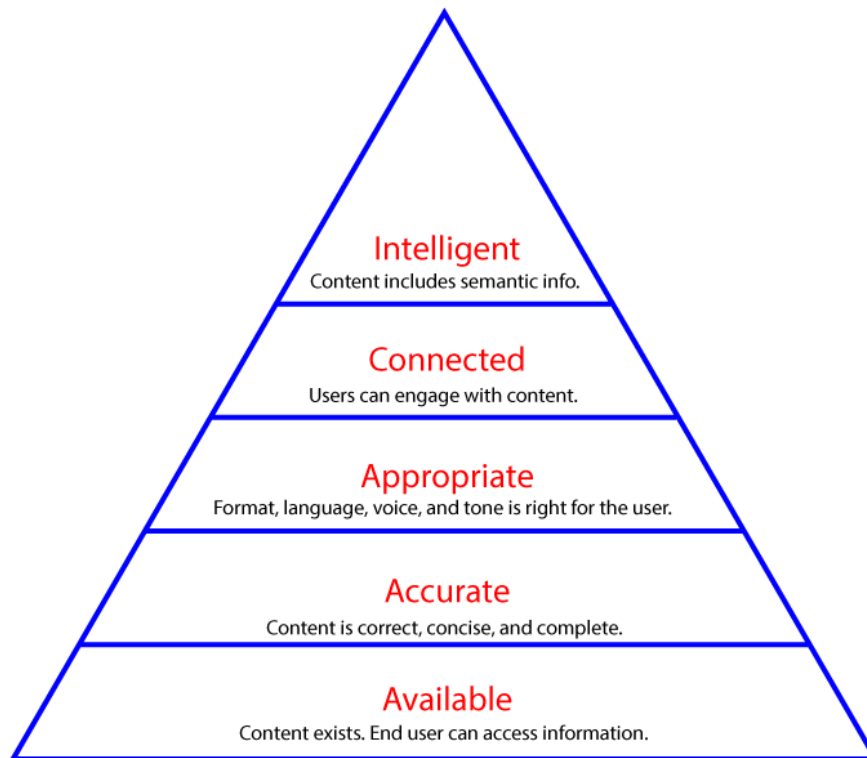




## The pyramid of customer experience needs

Sarah O'Keefe over at Scriptorium.com blogged about a proposed hierarchy of content needs. Her point is that there are levels of content needs that your customers have and these needs are foundational to any content strategy.

This is her picture of the content needs and expectations of your customers:



At the bottom is **Available**, in that the customer must have access to the content. For example, delivering one copy of a user guide and no online help for an

enterprise product makes the instructions to use the product unavailable (because the manual always gets locked away with the source discs).

But she also wisely covers PDFs that are unsearchable, for example. While the content may be in the 300 page PDF you provide online, if the content isn't searchable, then your users can't find the information. It might as well be locked away.

Moving up to the top of the pyramid, we reach **Intelligent content**. Sarah cleverly says:

*Intelligent content might include content that is personalized, [such as] interactive service manuals, the ability to filter information based on my needs, and more.*

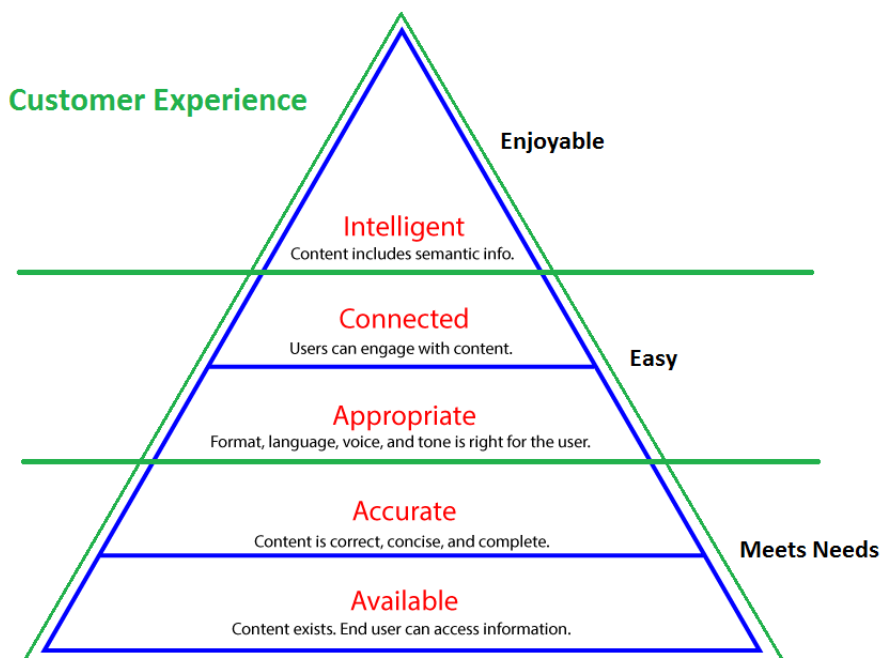
This is content that invisibly makes the customer happy and meets their needs with little to no effort. It just magically "knows" what and when it should appear.

## Customer experience needs

The customer experience world has a similar pyramid about meeting the experience needs of your customers.

But when I thought about Sarah's content needs pyramid and the customer experience pyramid, I saw that they are very similar.

Using Sarah's and adding my own pyramid (green lines), we get:



## The pyramid of customer experience needs

This is where product instructions fit into your customer experience program. And where your customer experience program fits into your technical communication program.

I think where I drew the top of the Meets Needs line is open to discussion, but I drew it where my gut (after 20 years of working in this field and working with customers) tells me the customers might draw it.

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**Customer support is the most expensive method possible to help our customers.**

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### **Bottom line**

If we're short changing the product instructions or not paying attention to them as part of the customer experience, we're blowing it. If we're depending on customers to call support to understand how to use our products, we're using the most expensive method possible to help our customers.

We're also aggravating them, because we shipped a set of instructions with the product. Why did we pay for the instructions to be created and not get our customers to the top of both pyramids?





## Why do we care about customer experience?

We care about customer experience because most of our companies see it as the way to differentiate. The people we work for, the ones who write our checks every year, care deeply about Customer Experience.

*“90% of North American firms view customer experience as important or critical to 2010 plans. 80% of firms would like to use customer experience as a form of differentiation. – Forrester’s: The State of Customer Experience 2010.”*

Typically, our companies are spending tens of thousands of dollars every year, training support staff, creating and running Voice of the Customer programs, studying the Customer Ecosystem, developing Customer Personas, and mapping out the Customer Journey.

All this and more is being done to increase sales, reduce customer churn, and increase customer retention.

It matters to your company a lot. So it has to matter to you.

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**Product instructions are not providing a good customer experience.**

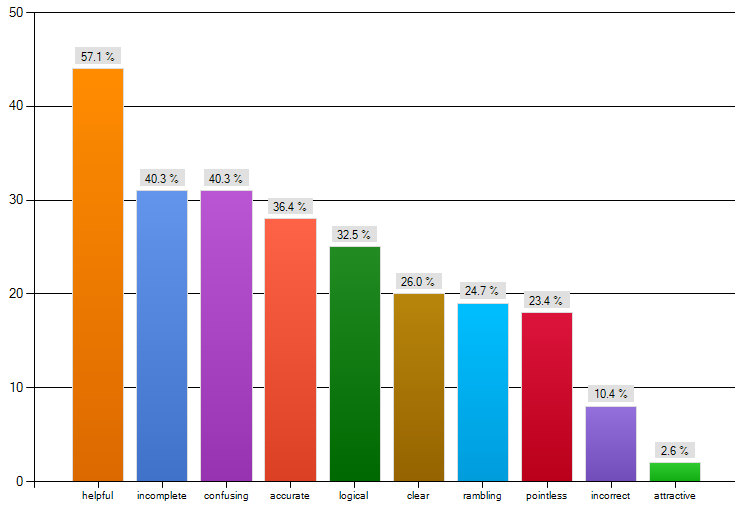
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## Most product instructions are just not that good

Recently, I ran a two question poll, asking people to identify themselves as either consumers or tech comm people. Then I asked what consumers thought of product instructions in general and what the people who create product instructions thought of what they were doing. Here's what the breakdown looked like:

## The Public

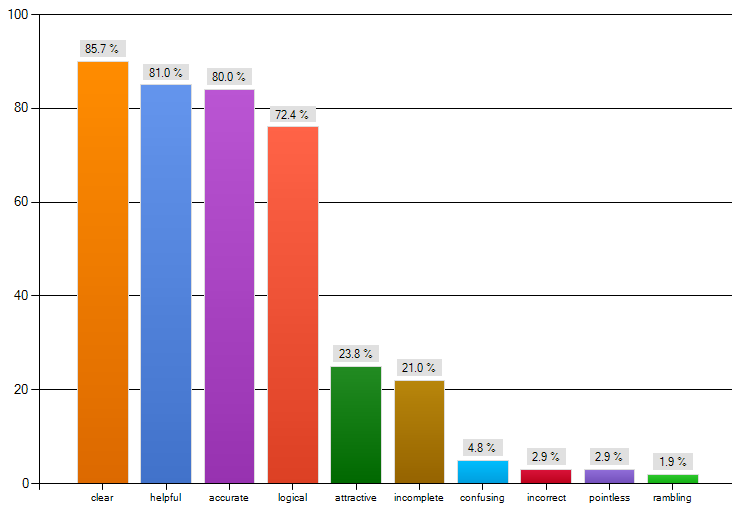
Thinking of product instructions in general, what words would you apply to product instructions?  
(Although you can choose all, please choose up to 5)



The top three? Helpful, incomplete, and confusing.

## Tech Comm Professionals

Thinking of product instructions you create, what words would you apply to the product instructions you create? (Although you can choose all, please choose up to 5)



The top three? Clear, helpful, accurate.



## Why do we care about customer experience?

We're barely meeting customer basic information needs, the bottom of Content Needs pyramid and the bottom of the Customer Experience pyramid. But the tech comm people think they're doing a great job.

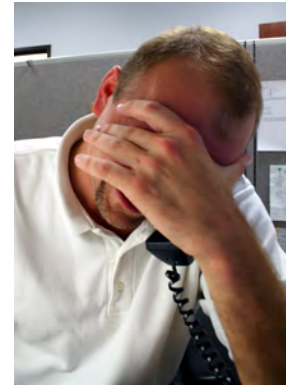
Our customers have a bad customer experience with our product instructions. And our product instructions are an unattended customer touchpoint, in that we're not right there, guiding the experience, as we do in customer support centers.

### **Most customer support is just not that good**

One of the areas that customer experience people focus on is making customer support more pleasant and well trained to solve customer issues. Most people don't like calling customer support, especially to solve a simple issue. And most of the time, it's not the fun experience the company wants it to be.

Most of us dread calling support. I know of a vendor who is the butt of jokes because the customer always seems to know more about the products than the support people.

*72% of all customers believe it takes too long to reach a live agent. 69% said they were on hold for too long. 50% of the people survey[ed] said that agents failed to answer their questions. 44% said the information they received was not accurate - Harris*



That's a lot of unhappy customers and a lot of money spent talking to them. Customer support is expensive. On average, at least for software, it's about \$25, per rep, per call, fully loaded. Day in and day out (The Content Wrangler). The average call lasts about 5 minutes.

If one support person can take about 67 calls per day (400 minute day), that's about \$1675 a day in support costs for one person. Multiply that by 10 people in your call center, and you have \$16,750 a day in support costs. In one day. What does a tech writer cost? About \$50 an hour, fully loaded. That's about \$400 a day.

A decent tech writer costs your company 25% of the customer support person, per day. Good content typically only costs a little more than bad content. And I think, with the right content development paradigm, it costs less.



## Bottom line

In my experience with companies, good product instructions drop support calls by as much as 10%. That's a reduction of about 7 phone calls a day, per support rep. And what does that add to the Customer Experience? It adds a lot, because people can easily solve their own issues and get on with their day.

That puts us near the top of the Customer Experience pyramid - or at least right in the "I didn't have to try hard!" area. It's where we all want our companies to be.







## Product returns are expensive

Let's look at the expense of product returns and how this impacts the customer experience.

Accenture research [Accenture-Reducing-the-Quantity-and-Cost-of-CustomerReturns.pdf] estimates that the annual cost of consumer electronics returns in the United States is \$16.7 billion in 2011.

Product returns are a big issue in the consumer world. And most product returns are a perfectly functional product. From the same report:

*[...] the return rate for consumer electronics devices is between 11 percent and 20 percent and rising [...]*

Of these returns:

- 68 percent are characterized as “no trouble found [NTF].”
- 27 percent are associated with “buyer’s remorse.”
- 5 percent are defective.



The bottom line is that 95% of returns are ultimately unconnected to product defects!

When customers return a product, the retailer and the manufacturer incur unneeded expense. It costs a lot of money to pay staff and move returned product around.

It's such an issue that there are consulting companies who help streamline the return process to decrease costs. Dropping the return rate by 1% can mean millions of dollars saved.

Of course, this assumes that you can't reduce those returns other ways. I have at least one way.

### **You have 20 minutes for people to be successful**

Most returns are because people couldn't figure it out how to use the product. And they give you about 20 minutes to make that decision.

When I say you have 20 minutes, I don't mean the entire product must be mastered in 20 minutes. The first 20 minutes is where the customer needs to feel adequate to the task—*Can I figure this out enough to feel confident about figuring this out?*

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**Most returns are because people couldn't figure it out how to use the product.**

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That 20 minutes isn't spent calling support. It's spent poking at the product, flipping through the instructions, and seeing what happens. Only highly motivated customers call support.

As a matter of fact, most customers don't call support, or at least it's their 4th option. In an opinion poll I'm currently running, calling support is the 4th option, right after poking at it to see what happens. We'll see after the results are in if that holds but it's an interesting preliminary result.

### **Returned products are a spoiled customer experience**

If our customers can't figure out how to use the product, or at least how to feel confident they can figure it out, that's a spoiled customer experience. It's also a very expensive smelly bad experience. If your company decides to reduce the money for clear instructions, that money will be spent many times over in product returns. From the same Accenture report above:

*The simple reality is that most CE manufacturers, retailers and communication carriers have not done enough to help consumers understand, set up, use and optimize the products they have purchased. Most companies, in fact, invest considerable sums to manage returns and relatively little to proactively prevent returns.*

The customer experience is the total sum of experiences with the company. If your customers return the product because they can't figure out how to use them, you may never get them back. Their experience with your brand is quite negative.



## Unattended touchpoint are the most difficult

When a customer calls a sales rep or customer support, we can guide their interaction and make their experience not bad. To a great extent, we're in control of the experience. We've trained our staff how we want them to be when they deal with customers. We can help the customer and try to make sure they have their needs met.

But unattended touchpoint, such as getting a bill in the mail or purchasing a product and trying to use it? We're not there in person, guiding the experience.

These unattended touchpoint are critical from our customers point of view, especially because we're not there to help them, to guide them through the touchpoint.

Unfortunately, most product instructions do not support solving the real issue:

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**Product instructions are  
an unattended customer  
touchpoint.**

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*[...] retailers and communication carriers have more or less the same challenge as manufacturers: create a satisfactory user experience that helps a bought product stay bought. (Accenture report)*

Unattended touchpoints, such as the 20 minutes a customer gives us to figure out their product, are out of our direct control. But we can do a lot more than we're doing. The cheapest and easiest way is to create useful product instructions. It's about customer retention.

Good instructions matter.





## Customer Touchpoints

Mapping the customer touchpoints your customers have with your company can typically expose the places where they are getting stuck or you can help the experience. These touchpoint maps are often big diagrams - and they should be - and then can burrow into each touchpoint.

I'm thinking about customer touchpoints and product instructions. I'm also thinking about attended and unattended touchpoints. I'm defining these touchpoints as follows:

- **Attended:** We can monitor what the customer is doing/how they are interacting with us and have the opportunity to guide that touchpoint experience. Attended touchpoints let us guide the customer through the touchpoint and help to get a pleasant experience for the customer. This is typically through a sales call or a support call. We or the customer reaches out and makes that person to person connection.
- **Unattended:** We can't monitor to know what the customer is doing and we have no way to guide that touchpoint experience should it go poorly. Unattended touchpoints are places where we have no control over the customer experience to a great extent. We don't know how or what the customer is doing with the experience - how it's managed, how they feel, if we are meeting their needs.

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**Unattended touchpoints  
are places where we  
have no control over the  
customer experience.**

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In unattended touchpoints, we often throw something over the wall and hope for the best. We may have some insight into what will help the customer but we have little control over those experiences.

Unattended touchpoints should scare you.

## Unattended touchpoints

I think that customers typically have many more unattended touchpoints than attended. Many product instructions - perhaps most? - are unattended touchpoints. Others are as well, but I'm interested in product instructions.

Recently an experience similar to the one charted out below happened to me. But this is a common enough scenario that I thought it was worth mapping out.

Customer Experience – Red is unmonitored, Green is monitored



This is a scenario mapped out with the attended and unattended touchpoints identified. It is not a customer journey, so please don't think that's what I'm trying to show. Most about that later.

About half of this specific customer experience happens before the customer moves into the attended touchpoint. And he didn't go there because he wanted to - he went there because he had no choice if he wanted to get that information. The unattended touchpoints didn't meet his needs or match his goals.

Even if we met Tom's goals and needs, look at what we put him through before he ever reaches an attended touchpoint. He wanted to help himself and solve his problem, but the unattended touchpoints didn't let him do that.



These unattended touchpoints are also cheaper ways for our customer to solve his or her own issues. Calling support is the most expensive way we can support the customer to find out the syntax for that field. (We could send a technician to his house to answer that question, which technically would cost more but you get my point.)

### Fixing these touchpoints

Product instructions are not the only unattended touchpoints but they seem to be completely ignored by Customer Experience professionals. Customer experience professionals do look at other unattended touchpoints, such as the bill they send out. They ask important questions, such as:

- Is the bill clear, in that the customer can see the charges at a glance?
- Are the line item charges using words that non-experts can understand?
- Do we clearly display a contact number?
- Does the bill look easy to understand, in that the layout is pleasant?
- Is the Due Date clear and easy to see?
- If English is not the preferred language for the customer, do we provide a way for them to see the bill in another language?
- And so on.

A lot of Customer Experience effort goes into making the bill clear because clear bills get paid faster and fewer people call for clarification. It reduces calls, which reduces call center costs.

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**We have to improve the unattended customer touchpoints. All of them count for our customers.**

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### Product instructions are typically unattended touchpoints

Most product instructions are unattended touchpoints. Think of the Getting Started guide that ships in the product box or the locally installed online help with the software. We don't know if these help the customer. In fact, most companies ignore the product instructions as part of the customer experience, even when the product



## Customer Experience and Product Instructions

online help is hosted on a server and Google Analytics could start providing insights. For free.

Customer experience professionals are not paying attention until the customer calls support. But looking at the touchpoint chart above, we see calling support is far into the experience.





## Customer Journey

The Customer Journey is the end to end experience your customer has with you. It's all the steps a customer goes through during their interactions with you. Sometimes these graphs/charts are large and cover all the interactions and sometimes they are smaller, more focused on certain areas.

Customer journey maps are always from the point of view of the customer, not from your point of view. And typically, they're from the point of view of one or more of your customer personas.

Most companies are not a good choice to do the map for themselves, because they "know" how it's supposed to work and forget that it may not work that way at all. It's important to map out what the actual experience is, not what we "know" the experience is.

What a customer journey map can expose are places where your company is not doing a good job managing the customer experience, especially in touchpoints. After you expose these areas, you can start improving, by fixing processes, removing obstacles, or training staff. Or many other things.

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**The product instruction customer journey starts at the OOB E and goes the lifecycle of the product.**

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There are also a lot of ways to represent a customer journey map. I prefer a grid that includes motivations and barriers so I can understand where we're frustrating our customer and what the goal is for them.



## The product instructions customer journey

I've been thinking about most customer journey maps and how they often either ignore the customer using the product or stop when the use starts. As you may have guessed, I think that's a mistake.

So I created a generic one that starts at the point of the Out of the Box Experience (OOBE) because that's where product instructions start. I'm thinking about consumer products here, but I think this can explore business to business products as well.

<b>Activity</b>	<ul style="list-style-type: none"> <li>• Setup</li> <li>• Install</li> <li>• Create first thing</li> <li>• Save</li> <li>• Output</li> </ul>			
<b>Motivations</b>	<ul style="list-style-type: none"> <li>• Get started with product</li> <li>• Feel confident about feeling confident</li> </ul>	<ul style="list-style-type: none"> <li>• Every day use/work</li> <li>• Make life easier</li> <li>• Not feel dumb</li> <li>• Feel confident</li> <li>• Just tell me</li> <li>• Not get in trouble</li> </ul>	<ul style="list-style-type: none"> <li>• Feel confident and ready to explore</li> <li>• Ready for details and concepts</li> <li>• Make use/work easier</li> </ul>	
<b>Questions</b>	<ul style="list-style-type: none"> <li>• How do I?</li> <li>• What do I need?</li> <li>• Why won't it...?</li> <li>• Now what?</li> </ul>	<ul style="list-style-type: none"> <li>• How do I...?</li> <li>• The previous product did...?</li> <li>• Why is...so hard?</li> <li>• Where did I see...?</li> <li>• Surely this must...?</li> <li>• Why did... happen?</li> <li>• How do I undo that?</li> </ul>	<ul style="list-style-type: none"> <li>• Can I?</li> <li>• Remind me how I...?</li> <li>• If..., then...?</li> <li>• Why do...this way?</li> <li>• Is there a better way to do...?</li> <li>• Why did... happen?</li> <li>• How do I undo that?</li> </ul>	
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Wrong information format</li> <li>• Wrong domain of knowledge</li> <li>• Not enough/too much information</li> <li>• Bad or wrong information</li> <li>• No information</li> </ul>	<ul style="list-style-type: none"> <li>• Lots of words or videos</li> <li>• Many different sources</li> <li>• Poor keywords for search</li> <li>• Wrong vocabulary</li> </ul>	<ul style="list-style-type: none"> <li>• Information simply not available in docs</li> <li>• Don't know the right special words to search</li> <li>• Multiple sources of content</li> </ul>	
<b>Customer journey</b>	<b>Out of Box Experience (OOBE)</b> <i>moved thru quickly</i>	<b>Common/basic tasks</b>	<b>Common advanced or common infrequent tasks</b>	<b>Power User tasks</b>

Obviously, I have some empty boxes. In a generic world, that was as far as I could get. In the real world, with a real product, I think there is a lot to add. I would also use the persona's name somewhere to keep us focused on who is doing what.



## Is there value for you?

In TechComm, we may have this generally in our heads but have never mapped it out. In the Customer Experience world, we may never have looked at this part of the customer experience.

The value of mapping this out starts showing you where the experience could be better, where you can make your product and the instructions stronger and more helpful. You see what instructions your users need through their experience with your product.

Oh, and by the way, the bulk of your customers spend all their time in the middle of the journey.

<b>Activity</b>	<ul style="list-style-type: none"> <li>• Setup</li> <li>• Install</li> <li>• Create first thing</li> <li>• Save</li> <li>• Output</li> </ul>			
<b>Motivations</b>	<ul style="list-style-type: none"> <li>• Get started with product</li> <li>• Feel confident about feeling confident</li> </ul>	<ul style="list-style-type: none"> <li>• Every day use/work</li> <li>• Make life easier</li> <li>• Not feel</li> <li>• Feel confident</li> <li>• Just</li> <li>• Not</li> </ul>	<ul style="list-style-type: none"> <li>• Feel confident and</li> <li>• to explore</li> <li>• details and</li> <li>• Make use easier</li> </ul>	
<b>Questions</b>	<ul style="list-style-type: none"> <li>• How do I?</li> <li>• What do I need?</li> <li>• Why won't it...?</li> <li>• Now what?</li> </ul>	<ul style="list-style-type: none"> <li>• How</li> <li>• This product</li> <li>• Why</li> <li>• What</li> <li>• Surely, this</li> <li>• Why did</li> <li>• How do I</li> </ul>	<ul style="list-style-type: none"> <li>• Can I</li> <li>• Ret</li> <li>• If..., the</li> <li>• Why d</li> <li>• Is th</li> <li>• I und</li> </ul>	
<b>Barriers</b>	<ul style="list-style-type: none"> <li>• Wrong information format</li> <li>• Wrong domain of knowledge</li> <li>• Not enough/too much information</li> <li>• Bad or wrong information</li> <li>• No information</li> </ul>	<ul style="list-style-type: none"> <li>• Lots of words or videos</li> <li>• Many different sources</li> <li>• Poor keywords for search</li> <li>• Wrong vocabulary</li> </ul>	<ul style="list-style-type: none"> <li>• Information simply not available in docs</li> <li>• Don't know the right special words to search</li> <li>• Multiple sources of content</li> </ul>	
<b>Customer journey</b>	<b>Out of Box Experience (OBE)</b> <i>moved thru quickly</i>	<b>Common/basic tasks</b>	<b>Common advanced or common infrequent tasks</b>	<b>Power User tasks</b>



Because most users move through the Getting Started phase quickly, moving into the intermediate phase and staying there. It's a Bell curve distribution. Remember, though, most customers give us about 20 minutes to feel confident they can figure this out, so we can't ignore that part of the experience, either.





## Customer ecosystem

Customer touchpoints are the tip of an iceberg for your company. Touchpoints are the places where your customer interacts with your company in some manner. From the customer's point of view, these may be very shallow interactions, in that they see only what they see - such as a support rep.

But under the touchpoints are a large network of various systems, department, staff, vendors, and others that make it all happen so the support person can breach the water to interact with the customer.

**Product instruction are part of the customer journey, often before purchasing the product.**

Mapping out the customer ecosystem can provide insights into how the touchpoints ripple through the rest of the company. Sometimes you can discover groups who never thought they had any customer impact are, in fact, impacting processes and system that create a negative touchpoint.

## Creating a chart

I think you should create an ecosystem chart for every touchpoint or group or related touchpoints - even the unattended ones.

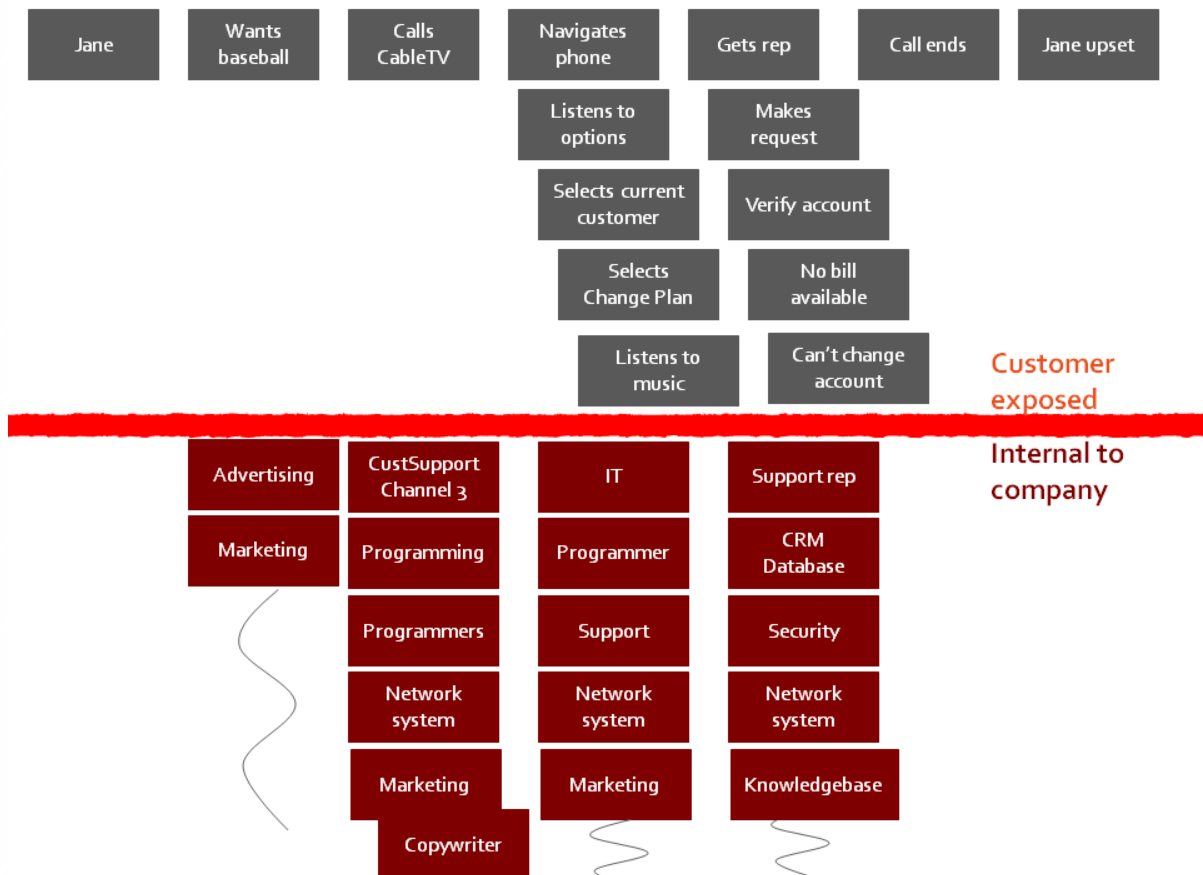
Here are the over all instructions. This should take less than 2 hours. Get Post-it notes, red, green, and yellow markers, and a large paper or whiteboard or wall.

1. Pick a customer and a touchpoint or journey. Your personas could be very handy here. It should be one that has some customer pain associated with it.
2. Write down all the customer actions involved in the touchpoint or journey. For example, if you were doing this for online help, write down everything

## Customer Experience and Product Instructions

the customer does when they look at a screen and decide they need more information.

3. On the Post-it notes, write down all the systems, people, groups, etc the customer interacts with during this journey. Include any objects that groups or systems touch. To continue the online help, you would include the servers and probably the webopps group.
4. Put all these in order along the top of the chart. Where needed, layer the notes down to show where something burrows as it touches multiple things.
5. Draw a line across the page/white board at the bottom of the customer stuff you just placed. Above that line is the customer exposed touchpoints/journey.
6. On more Post-it notes, add the people, groups, outside vendors, etc that support or interact with each of the items identified above the line. You should have the entire ecosystem when you're done. it should look sort of like the following graphic:

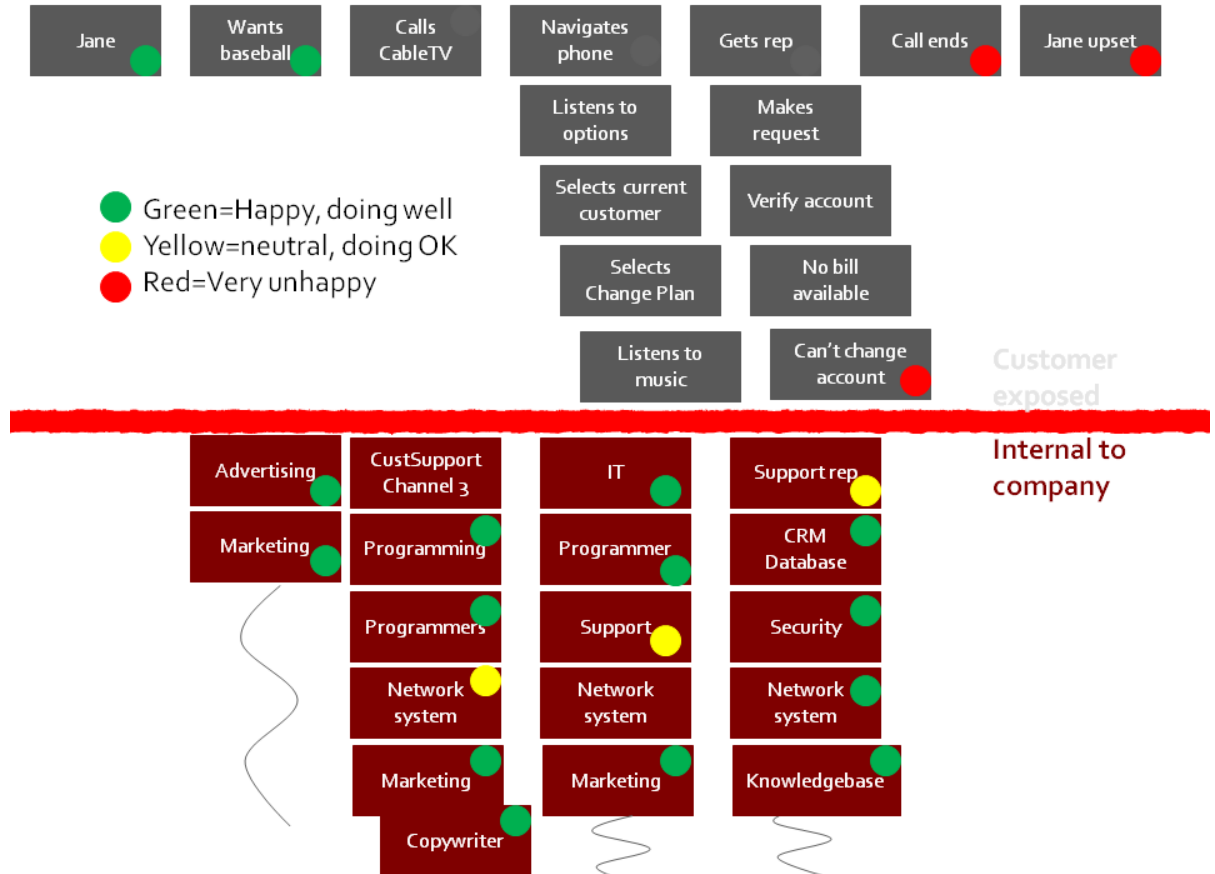


7. Everything above the line is customer facing and everything below the line is what's needed to make the customer facing stuff happen. Now, use your



## Customer ecosystem

markers to indicate happiness levels off all people, groups, etc involved. Green is happy, orange is not happy but not unhappy, and red is unhappy or broken. You get something like this:



8. In most cases, the groups below the line are marked green, in that they are very happy with their efforts and how it's going. They probably would rate themselves high in doing a good job. But if you follow the line up, it's part of an unhappy customer when we look at the top of the iceberg.

Now, you see what needs to be fixed or changed to improve the customer happiness levels. And, if you're doing this with product instructions, you see what's involved in getting the docs to the customer and how.





## Creating product instructions that improve the customer experience

We know that product instructions are part of the customer experience, albeit an overlooked one. Very often, the people creating the instructions are part of engineering or marketing, almost as an afterthought. Or product instructions are created off-shore, because “no one reads the manual.”

Our customer feelings about product instructions are important to us, as they go to ease of use of products, and to the total customer experience. If the customer can't use the product, our efforts at creating the product go to waste. Additionally, every time customers contact support because they couldn't find what they needed in the product instructions, this costs the company money. Worse, if the consumer decides the product is too difficult to use, they return it, adding return costs to the company.

### What do we do?

Creating useful product instructions is not magic or accidental. It requires an understanding of the audience, of their existing knowledge, and of their information needs.

There is an entire field of professionals who can help you get product instructions that improve the customer experience and this next section is not meant to make you an expert. Rather, this section gives you a place to start looking to see if your product instructions are meeting the basics.

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**Creating useful product instructions is not magic or accidental.**

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### Audience

Understand who your audience is and that your audience is nothing like you or your team. Your audience isn't stupid, but they are not be experts in your product.

Also understand that people quickly move from beginners to intermediate users and stay there. Most people never become experts in your product because they don't need to be. People just want to do their tasks in your product—whether it's create a report or get a good candid picture of their child. They don't want to know the technology behind the tasks, they just want to do the tasks.

Understanding that most people don't want to know about your technology and want to do their tasks means talking about your product from the customer's point of view. Be customer-centric in your product instructions. Do a task analysis of your product and create instructions for those.

Your customer experience personas should include level of expertise and their tasks.

### Information needs

Related to audience and tasks are the information needs of your customer. After you know what tasks your customers want to do, you can design content to support them. For example, is your product software? If so, then instructions may be best delivered in the interface.



Would short videos (under 5 minutes) watched on their smart phone be helpful? Is there a task that's rather complicated to describe that is easy to show? Does your audience have a smart phone? How do you let them know a short video is available?

What other places would your customer need pieces of content to help them in their tasks and what's the best delivery method? The answer isn't always video, by the way, and certainly not 30 minute videos.

### Previous knowledge

Everyone brings previous information to the table. For example, most people know in general how to make a phone call. Your smart phone should make a phone call similar to everyone else. This task doesn't need any instructions.

But making a phone call that brings in several people is a different kind of phone call and is more complicated. Additionally, most people don't do it often. Complicated or infrequent tasks need instructions. Common tasks need fewer or no instructions.

Many instructions include nothing that the customer can't puzzle out, based on their existing knowledge. Someone decided that "someone" might not know. And,



## Creating product instructions that improve the customer

because time is a limited good, the time spent on the obvious is time not available to create the instructions for the more complex.

Again, your customer experience personas should include the previous knowledge of your customers. Waste no time creating instructions for the obvious that you know your persona knows about.

### **When in doubt, bring in an expert**

Obviously, the previous section is not everything you need to know to provide the best customer experience in product instructions. But it gives you a place to start looking at your product instructions to see if you're meeting the basics.

And if you're not certain your product instructions are adding to the customer experience, you can and should bring in an outside expert. We can help evaluate your situation, your products, your product instructions and make recommendations to improve your situation.

**Bring in an expert to see  
where you can improve  
and how to measure it.**

You might be surprised as how some small changes can improve your Net Promoter Score and/or your Customer Effort Score.







## About Anthrobytes Consulting

Anthrobytes Consulting is a boutique consulting company that helps clients improve the post-sales customer experience. With 15 years of experience in the field, we've helped companies large and small, such as Pitney Bowes, Royal, and Hewlett Packard to improve their product documentation and documentation workflow.

Anthrobytes Consulting is owned by Sharon Burton.

Sharon Burton is a nationally recognized expert, public speaker, and instructor in the field of Customer Experience and Technical Communication. She has received numerous honors for her work, including the distinction of Associate Fellow by the Society for Technical Communication.

She can be reached at [sharon@anthrobytes.com](mailto:sharon@anthrobytes.com). The company website is [www.anthrobytes.com](http://www.anthrobytes.com)

Sharon Burton's books include *8 Steps to Amazing Webinars*, *Consumer Feelings about Product Instructions, 2012-2013*, and contributor to *The Language of Content Strategy*. All these books are available from most online book retailers, such as Amazon and Barnes and Noble.



Anthrobytes Consulting  
sharon@anthrobytes.com  
www.anthrobytes.com  
+1-951-369-8590