

Exposing the Real Customer Experience via Ethnographic Videography

Capturing the customer experience as it happens

Qaalfa Dibeethi, Chief Operating and Consulting Officer

Steven Walden, Principal Consultant and Head of Research

One particular problem for companies is that the traditional means of research by verbal survey and focus group requires rational reflection rather than 'in the moment' response and hence provides only a partially valid set of criteria on which to base consumer decision-making. Customer Experience practitioners have been experimenting, adopting and adapting a variety of techniques and approaches from ethnography. Ethnography is the study of human social interaction and phenomena through fieldwork with a heavy emphasis on qualitative research especially observation. The key benefit of ethnography to Customer Experience is that it presents back the 'whole' experience however intuitively or rationally perceived by the customer. By taking into account the whole phenomena, ethnography avoids the problem of trying to understand the causes of a certain behavior or perception in isolation. Another key aspect of ethnography is that it describes a cultural reality such that a non-member of a culture can "pass as an insider" in other words as their customer. Ethnographic videography involves filming the experience as it happens in order to (1) to provide deeper accounts of an experience as it is lived by the observer and (2) to explore deeper hidden (or "subconscious") meanings driving consumer behavior which even the insiders (i.e., customers) may not be able to confirm or validate in a direct sense.



BEYOND PHILOSOPHY

Building Great Customer Experiences
<http://www.beyondphilosophy.com/>

Exposing the Real Customer Experience via Ethnographic Videography

Customer Experience Management (CEM) represents a paradigm shift in corporate thinking consequent on the failure of Customer Relationship Management (CRM) to deliver sustainable improvements in customer loyalty. On the face of it CEM's aim to provide a great Customer Experience as a pathway to loyalty and increased revenue seems like a no-brainer. Yet companies have found designing an experience that delivers significant return on investment a challenge.

Some of the key problems in design relate to understanding exactly how to construct an ideal experience. For instance, as consumers do not respond to service environments in a purely rational manner but have intuitive thoughts, feelings, emotions and affective responses, how can companies tap into and influence this behaviour?

One particular problem for companies is that the traditional means of research by verbal survey and focus group requires rational reflection rather than 'in the moment' response and hence provides only a partially valid set of criteria on which to base consumer decision-making.

Yet understanding intuitive reaction is already recognised by leading ethnographers such as Paco Underhill as important in value creation. For instance, it has been noted how revenues increase with a well-carpeted floor in a department store or how the 'blue' in an O2 store sticks in the memory.

Therefore, in order to provide answers to these questions, Customer Experience practitioners have been experimenting, adopting and adapting a variety of techniques and approaches from fields old and new. Examples that come to mind include psycholinguistics¹ and neuroeconomics² through the use of techniques such as audio mining via psycholinguistics and decision modelling in contact centres and marketing. Likewise, ethnography has also come to the fore as one of the most important techniques in support of understanding Customer Experience.

Ethnography: A Brief Introduction

Ethnography is the study of human social interaction and phenomena through fieldwork with a heavy emphasis on qualitative research especially observation.

The key benefit of ethnography to Customer Experience is that it presents back the 'whole' experience however intuitively or rationally perceived by the customer. By taking into account the whole phenomena, ethnography avoids the problem of trying to understand the causes of a certain behaviour or perception in isolation.

Another key aspect of ethnography is that it describes a cultural reality such that a non-member of a culture can "pass as an insider" in other words as their customer. Ethnography thus succeeds in delivering to an outsider, an insider's view. This is important because in general, most members of staff and especially management have become outsiders to their business' own Customer Experience.

Without this viewpoint, management risk focusing on Customer Experience per se as something in isolation, independent of customer need. As understanding and satisfying needs are fundamental to business success, without a customer perspective there is the risk that an internal definition of

¹ Psycholinguistics or psychology of language is the study of the psychological and neurobiological factors that enable humans to acquire, use, and understand language.

² Neuroeconomics combines neuroscience, economics, and psychology to study how we make choices. It looks at the role of the brain when we evaluate decisions, categorize risks and rewards, and interact with each other.

Exposing the Real Customer Experience via Ethnographic Videography

Customer Experience is considered the same as satisfying consumer need. It is not, as any visit to a decidedly plastic themed restaurant with awful food confirms.

One of the primary benefits of an ethnographic approach is therefore to demonstrate how much of an “outsider’s” view the business has embedded in its operations and how through reflection on the reality of the whole customer experience, management (i.e., outsiders to the real customer experience”) can better internalize the customer viewpoint; thinking like a customer while reengineering and enhancing an experience.

Participant Observation

The main technique of ethnographers is participant observation. This simply means that the observer takes part in the experience he or she is observing, unlike a laboratory set up where the ‘observed’ is distant and not a part of the experience. The intent of all this is for the observer not to disturb the normal experience and hence provide a more valid and richer set of results than would normally be the case within a standard interview program.

The most efficient way for this to happen is to pretend to be a participant while “spying” on the experience. In this respect, mystery shopping is a related approach but different from the ethnographic Customer Experience methodology as outlined in Figure 1.

The ethnographic approach tends to have two goals: (1) to provide deeper accounts of an experience as it is lived by the observer and (2) to explore deeper hidden (or “subconscious”) meanings driving consumer behavior which even the insiders (i.e., customers) may not be able to confirm or validate in a direct sense. For instance, can you honestly articulate all of the elements that drive you to buy a brand of milk, tea or rice?

Simply put, the ethnographic approach illuminates the full Customer Experience as it is experienced. A full customer experience which is itself comprised of (1) those things the customer is consciously aware of and (2) the deeper hidden elements that drive customers (see Figure 2 below).

Figure 1

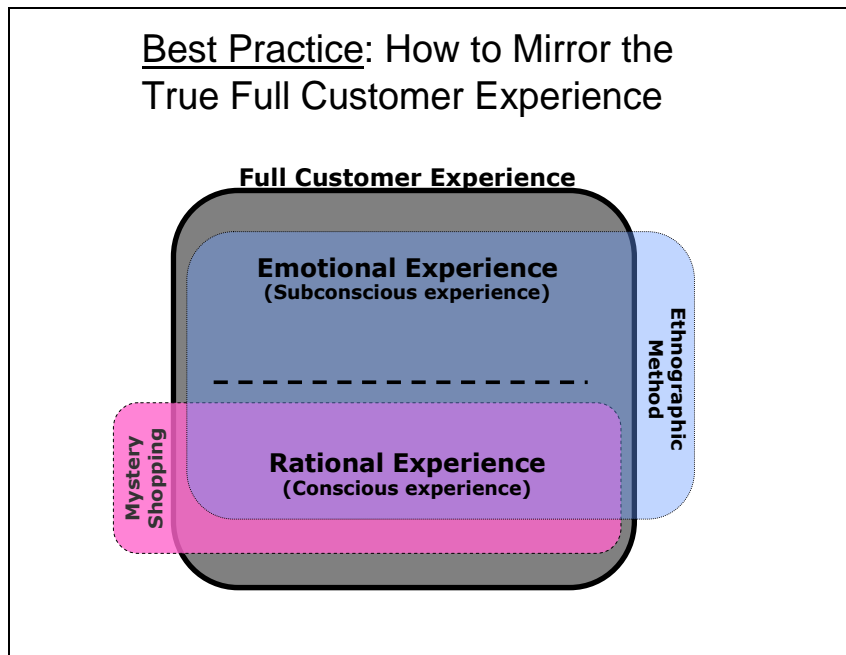
Mystery Shopping is different from Customer Experience Ethnography

Mystery shopping is a type of participant observation but fails to fulfill the ethnographic criteria and as such cannot typically be used by management to internalize an outside-in point of view. It further does not provide the business with an accurate view of the Customer Experience as customer’s experience it.

The goal of mystery shopping is to ascertain whether policies and procedures are being followed by customer facing employees. Often the implicit assumption is that the business has already taken into account the needs of customers and addressed these in the design of its policies and procedures. As a result, the aim of the mystery shopper is to gauge how well employees adhere to the “Customer Experience” as defined by such policies and procedures.

Unfortunately, mystery shopping does not take into account whether those policies and procedures have been designed from a customer experience point of view; as is commonly the case.

Figure 2



However, there is a practical reason why this non-mystery shopping ethnographic approach has not been more widely adopted in business. It is difficult to document the full experience in a way that is convincing and that also gets around the problem of observer bias in interpretation.

In traditional ethnography the experience is documented by diarizing it (i.e., journalizing the experience in minute detail as it is happening). However, long detailed diaries are not a practical output for business consumption. Secondly, being a participant observer in many consumer experiences precludes the observer from detailing the experience as it happens. Furthermore, the timeframe of many experiences is often intense and of relatively short duration (e.g. making a purchase at a local shop).

These issues can be dealt with by diarizing a series of the same experiences under study over time but unfortunately, in business, time is a commodity in short supply. It is also problematic for a single observer to diarize a series of experiences that may involve purchases.

Videography as an Adjuvant

What is required is an adjuvant to the traditional paper based diarizing that meets the two ethnographic objectives mentioned above and at the same time allows for the capture of the full experience. Ethnographic videography is the solution to these issues.

In brief, this involves filming the experience as it happens although obviously, not while holding a video camera as that would be disruptive to the experience. In principle this may seem simple to carry out but in practice it is not. Indeed, there is a whole area of academic pursuit devoted to perfecting this and a number of schools have departments of Visual Sociology³. For example, Goldsmith's

³ Refer to the International Visual Sociology Association (IVSA) for more information.

Exposing the Real Customer Experience via Ethnographic Videography

College of the University of London⁴ has a degree program in “Visual Sociology” that is devoted to combining traditional written sociological argument with film, sound, or photographic representation. This offers researchers the opportunity to re-think both the conduct of social research and the forms that social research output takes.

The point is that this is a developing methodological area that has not yet been perfected and is thus at the cutting edge when applied to the business arena.

However, there are two developments which have made ethnographic videography a practical methodology for studying the Customer Experience in business: affordable quality spy camcorders and a robust customer experience assessment system that accounts for the full experience (both emotional & rational).

First Objective: Recording the full experience and the required equipment

The availability of affordable micro-cameras and digital video hard drives are key factors in making ethnographic videography a practical reality for business. Micro-cameras (or spy cameras) are easy to get and they are produced in forms that make them easy for a participant observer to utilize (e.g., eyeglass cams, button cams, and tie cams to name a few).

Figure 3

Figure 3 shows me in the act of stealth filming a customer experience. I was wearing a buttonhole camera in this particular instance. The photo in the upper left shows the salesperson⁵ as captured on my buttonhole cam while I was interacting with him. The photo in the bottom right corner shows our interaction taken at the exact same time as taken from a second spy camera a few meters away (tandem recording). The beauty of this approach is that it is unobtrusive but complete. Figure 4 (next page) gives some tips you should consider if you are going to try this on your own.



⁴ <http://www.goldsmiths.ac.uk/pg/mphil-phd-visual-sociology.php>

⁵ The salesperson's face is blocked to protect his privacy.

Exposing the Real Customer Experience via Ethnographic Videography

Figure 4

Step	Description	Challenge
1	Secure appropriate spy camera	Understand which type of spy camera will be most appropriate for the experience. A tie cam may not be appropriate in situations where t-shirts are more the norm (e.g., gyms).
2	Secure appropriate video hard drive	Be certain that the hard drive you purchase is portable. Often times portable means transportable for hard drives not effectively battery operated.
3	Determine whether tandem recording is necessary	You need that second spy cam and operator if the experience is volatile or if there are lots of related activity going on around the primary observer.
4	Practice, practice, practice	You will find that videoing when you are not able to look at a viewfinder is difficult to say the least. It will take practice to learn to accurately gauge the aim of the spy camera.
5	Develop an in-the-field equipment quick check procedure	You will need to maintain your confidence that your equipment is indeed recording. A quick check procedure will give you an early warning when there is a problem in the field thereby preventing wasting valuable filming time.
6	Double check batteries	This is the most common technical failure point.
7	Make sure you have access to a PC powerful enough for video editing	It takes quite a bit of CPU power to process video. Something in the range of 1 to 1.5 GHz is recommended. If you do not have the computing power to do it, get the video professionally edited.
8	Make sure the final primary video montage is no more than about 5 minutes in length – shorter if you can	Boredom will set in if your video has lots of dead action sequence. Again professional editing is key to making the final video montage exciting to watch while not cutting out important aspects of the experience!
9	Make sure the final video montage gets across the full customer experience	This means special emphasis needs to be made to bring the emotional elements to the fore... even if those emotions are centered on the banal.
10.	Subtitling	Remember that to a viewer some of the words maybe unclear, subtitling helps.
11.	Being aware of legal obligations	Where personally identifiable features are an issue then 'fuzzing faces' in the edit process may be necessary.
12.	In the moment research notes	Where possible record reflections in the moment – there is a difference between looking back at an experience on video and assuming things are felt or seen when they are not.

Exposing the Real Customer Experience via Ethnographic Videography

Second Objective: Documenting the deeper hidden experience elements

The second development key to making ethnographic videography practical for business is the development of a robust system for interpreting the deeper hidden drivers of the customer experience (e.g., the subconscious emotional experience of customers).

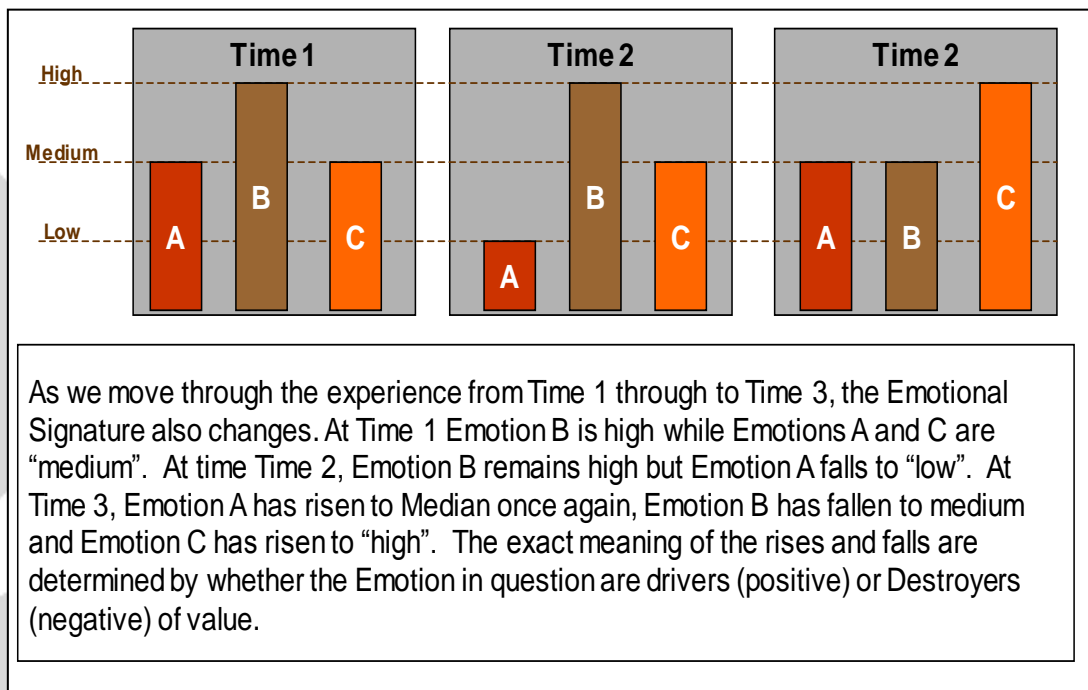
Remember this is required in order to fulfill the second objective of ethnographic videography.

Beyond Philosophy has released its findings from a two year study to discover the drivers and destroyers of customer emotional engagement.⁶ The outcome of that study is a robust system for modeling the emotional customer experience – the Emotional Signature[®]; the first of its kind designed specifically for use by business. Essentially, the emotional experience model that was developed on the back of this research allows the video output to be analyzed for the degree to which each of the now identified 20 known drivers and destroyers of the emotional experience are present.

While the detailed description of how this is done is proprietary, think of the Emotional Signature[®] as a kind of mixer board (i.e., equalizer) of the emotions that drive and destroy value in the Customer Experience. As we move through the Customer Experience that mixer board of emotions is also moving.

Figure 5 shows how this might look in a simplified format. In practice, this “real time” Emotional Signature[®] is superimposed on the video so that the deeper hidden aspects of the experience are brought to the forefront.

Figure 5



⁶ “The DNA of the Customer Experience, How Emotions Drive Value” at Amazon.com

Exposing the Real Customer Experience via Ethnographic Videography

We have found that this combination of irrefutable video coverage alongside the deeper insights of the Emotional Signature® allows management to internalize the experience from the customer's point of view while keeping the ever present pressure to reinterpret the experience from the business' perspective at bay.

It is also useful for staff training programs. If a picture is worth a thousand words, a video is worth a hundred times more. Ethnographic videography is a recommended technique to use when you want your colleagues to "get it". This means not simply appreciating the experience and what needs to be corrected at the intellectual level but "getting it" at the gut level.