

best practices:

Customer Experience Investigation

Our new Best Practices offerings have been designed to help your organization optimize the full potential of your Tealeaf investment. With hundreds of successful implementations under our belt, we've amassed an arsenal of best practices. And our industry-leading Best Practices team has created a maturity model to help impart this know-how in a manageable way—one that reduces your learning curve and gets you to value as quickly as possible.



>> Figure 1: Tealeaf Best Practices and Our Recommended Maturity Model

The Customer Experience Investigation (CEI) offering is designed to help you begin to leverage Tealeaf for examining customer experience issues and determining their business impact. After organizing a cross-functional team to watch a set of Tealeaf sessions (sometimes referred to as “movie nights”), you’ll learn how to determine common patterns among sessions, identify unknown site issues or validate suspected ones, begin to investigate the business impact, and prioritize site improvements accordingly. By the end of the engagement you’ll begin to see your site in a whole new way—from the customer’s perspective.

This offering can be customized to fit the unique needs of your organization and site configuration. We’ll work with your team to:

- > **Gather Requirements.** We’ll demonstrate how to determine relevant segments of customers or specific functional areas of your site to investigate, and how to pull the relevant sessions to view. You’ll also determine the appropriate cross-functional participants and create agendas for future CEI meetings.
- > **Share Best Practices.** You’ll learn best practices on reviewing customer sessions, summarizing your findings, investigating whether other customers have been impacted, and creating an action plan to resolve any observed issues. You’ll also set up relevant searches and reports to identify customers that may have been impacted by an issue, and set up proactive alerts to avoid similar issues in the future.
- > **Investigate Site Conversion.** Are conversion rates down because of a bug in a newly released application? Are conversion rates up because a redesigned site process is helping customers more easily complete transactions? You’ll learn how to view relevant customer sessions to investigate your hypotheses about site conversion and drive site improvements.
- > **Provide Training.** As needed, your Best Practices consultant will help you get more familiar with Tealeaf’s replay functionality. *Please note, if additional days are needed for refresher product training, they will be incremental to the current number of engagement days.*

With your customers’ actual sessions right in front of you, and the insight of a cross-functional team, you’ll quickly be able to identify critical site issues, investigate the impact on customers, and, ultimately, better understand your web site from the customer’s point of view.

OBJECTIVES

- > Align team around a customer-centric view of the online experience.
- > Observe and review actual customer behavior on a regular basis.
- > Determine common threads or patterns.

BENEFITS

- > Understand issues from the customer’s point of view.
- > Validate hypotheses about customer behavior.
- > Create an optimization action plan based on real customer experiences.

Required Tealeaf Products	cxImpact
Customer Participants	Departmental Stakeholders Tealeaf Project Manager Tealeaf Users
Duration	1 day
Recommended Timing	1 to 3 months following your initial implementation. Ongoing, as required.

- > **To learn more about Tealeaf’s Best Practices offerings, please contact your Tealeaf Account Executive.**