

plus relocation



In Their Shoes

Susan Schneider

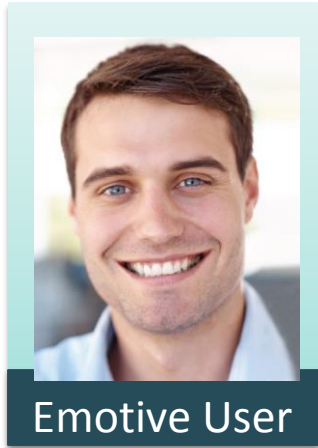


Experience Design

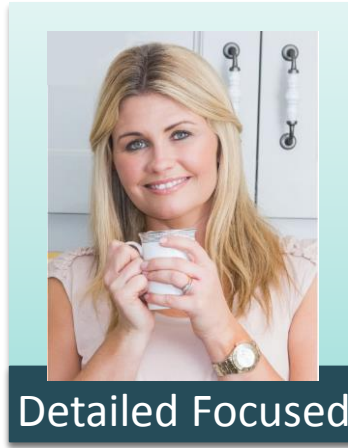
Both an art and a science. You can design and manage every interaction touch point in an integrated fashion. You can deliver an unparalleled or unrivaled experience, but you can't do it from your current vantage point.



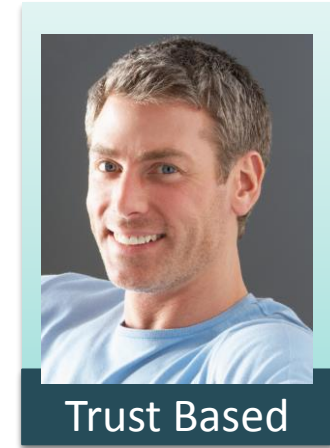
Transferee Personas



- Needs to know everything will be ok
- Trusts that we will take care of them and their family
- Wants to feel “heard”
- Uncertainty is more complex than just logistics of their move



- Needs to know what is happening at all times
- Prefers to “own” and track their move piece by piece
- Protects their families interests by requesting access to all information
- Wants to know what to expect



- Needs to know that someone is doing it “right”
- Has a higher than average tolerance for uncertainty
- Doesn’t need to actively engage with details
- Wants to focus on the things that are more important than their move



Understanding the Customer Journey

Getting Into Their Shoes

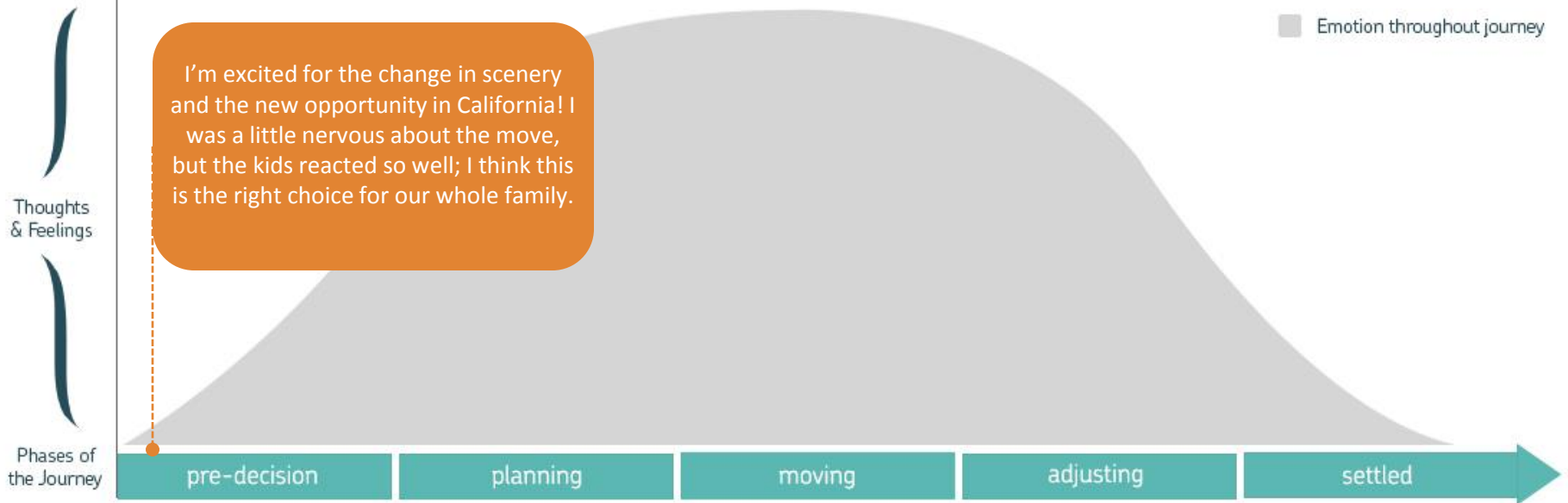
- 01 JOURNEY PHASES** What are the major parts of the process from beginning to end?
- 02 TOUCH POINTS** What interactions do you have with your contact during each phase?
- 03 ANXIETY** What is the level of stress?
- 04 PACE** What is the actual pace and what is the ideal pace?
- 05 EMOTIONAL STATE** What is the customer thinking and feeling during each phase?
- 06 NEEDS** What does the customer need during each phase?





Pre-decision

- Review needs assessment
- Review family information, departure status and moving needs
- Respond to questions and be a resource on moving in general, specific concerns and possible benefits
- Provide a cost estimate





Planning

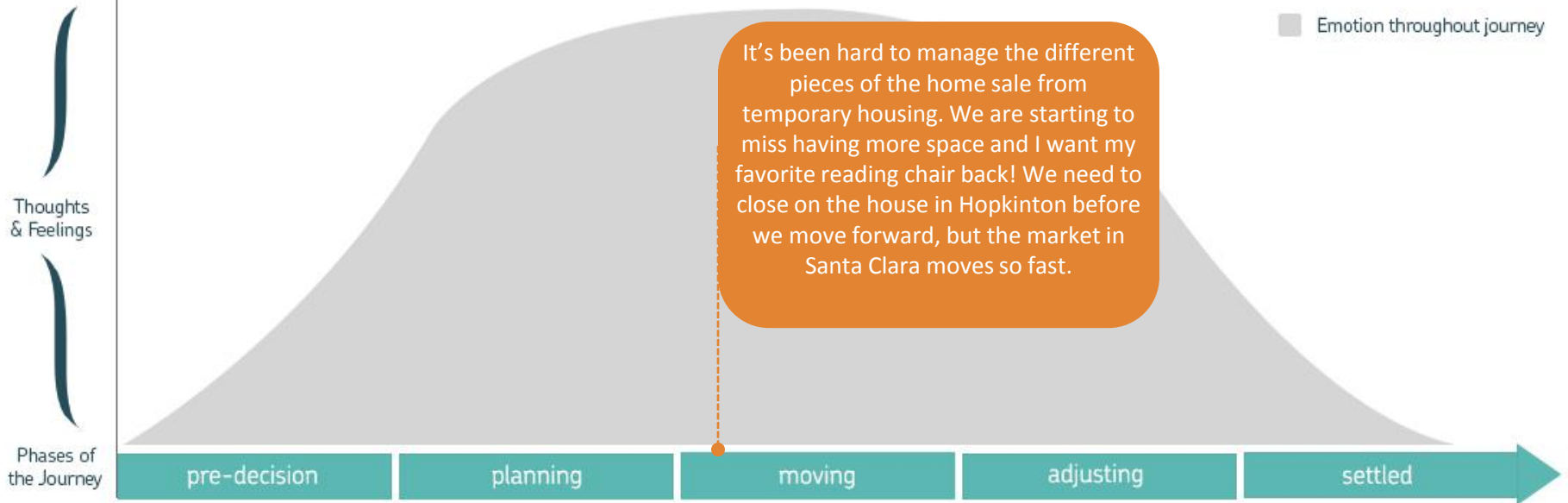
- Review all benefits
- Provide info regarding communication, tools and processes
- Coordinate connections to other key players and partners





Moving

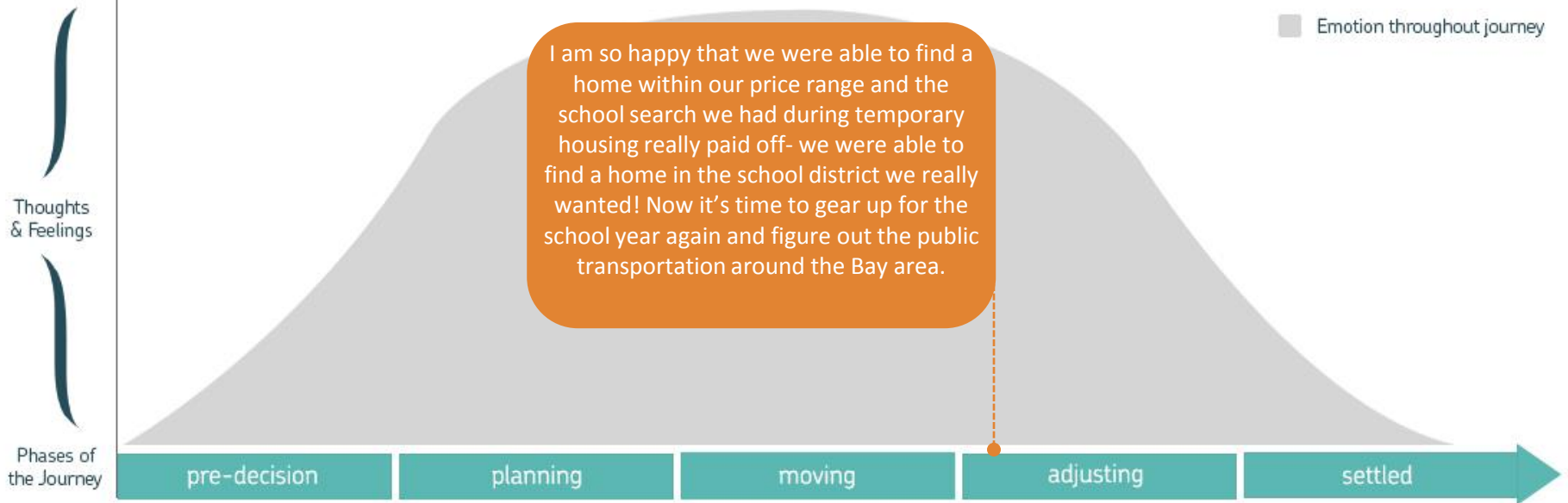
- Confirm plans for chosen services
- Confirm final details
- Continue scheduled check-ins
- Respond to employee questions





Adjusting

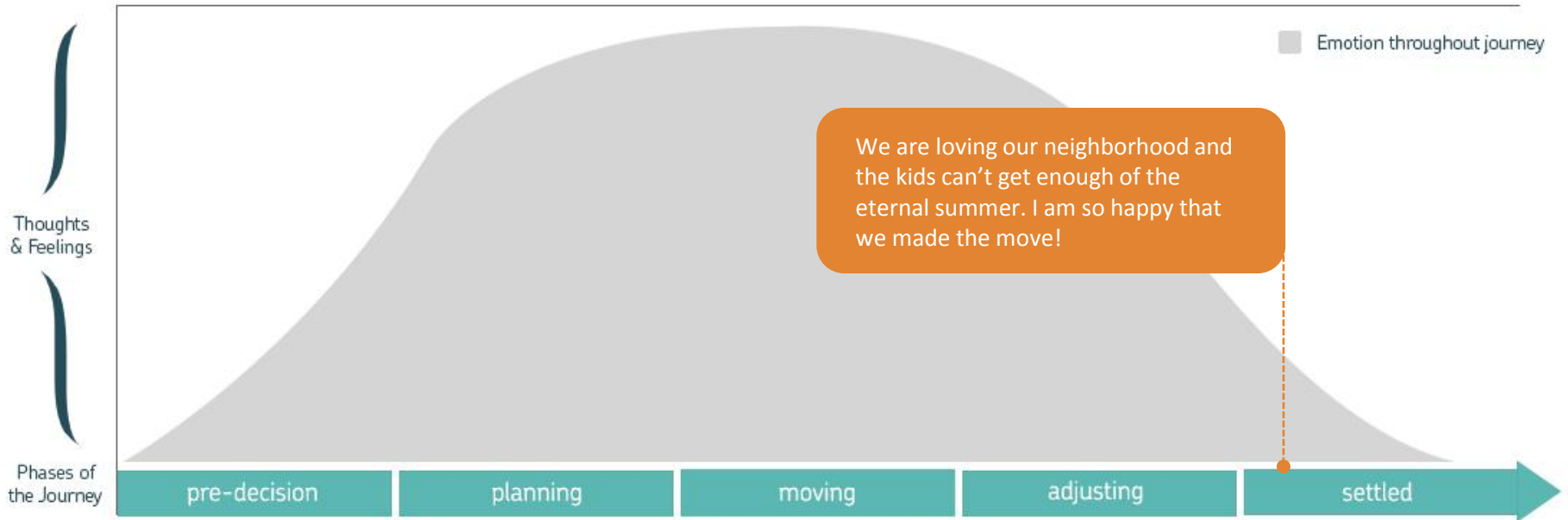
- Confirm delivery of services and address any claims issues
- Discuss benefit utilization and any tax-related impacts
- Continue scheduled check-ins
- Respond to employee questions





Settled

- Discuss expiration of approved benefits
- Determine if anything can be done to assist the employee in feeling settled in their new location
- Provide online satisfaction survey



Improving the employee experience



Start Doing

Identify simple things that you can implement to enhance the experience of the relocating employee.



Stop Doing

Evaluate your current practices. Are there things that you are doing that are not necessary or may need to be adjusted to provide a better experience?



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Thank you!

