NAVIGATE

Transforming the Customer Onboarding Experience Through Empathy-Led Design
One of the Leading Global Healthcare Solutions Companies

BUSINESS PROBLEM

The customer service and support team at one of the leading global healthcare solutions companies wanted to enhance their competitive advantage by improving their onboarding process for customers, ranging from regional pharmacies to prominent national health systems.

They knew that there were pain points for their customers with their current process, which could potentially create a negative overall customer experience and drive down retention rates. They believed that a transformation of their process was required to truly provide marketplace differentiation in a highly competitive industry; however, they didn't know where to begin to successfully improve such a fundamental aspect of their business.

SOLUTION

The company was confident that their onboarding process needed improvement, but with a range of internal teams and client types involved, they were unclear about what specifically needed to be addressed. At Navigate, we use a Design Thinking approach to solve complex problems and tackle ambiguity, so we employed a customer-centric, design-led approach to understand the company's onboarding challenges and identify improvement opportunities.

To begin, we took an empathetic approach to gain further insight into the problem and define the parameters of the challenge, starting with a focus on the customer's journey. We conducted interviews with 60+ internal and external stakeholders to better understand their roles in the onboarding process, their needs, and their pain points. These interviews helped to shape a holistic picture of the current state of the onboarding process. We also used this information to develop guiding principles for the engagement, including transparency, speed, and other key concepts. All future implementations would have to relate to these principles in order to move forward, helping to ensure that the changes would truly impact the business, the customers, and stakeholders.

CLIENT

Customer Service & Support Organization at One of the Leading Global Healthcare Solutions Companies

EXECUTIVE SUMMARY

- Company wanted to improve its onboarding experience to maintain competitiveness, relevance, and differentiation in marketplace

- Existing process created potential for decrease in customer retention

- Leveraged Design Thinking to reimagine and optimize onboarding process, developing roadmap for "quick win" and long-term improvements

OUTCOMES:

Shared understanding of customer expectations

Improved cross-functional collaboration

More transparent onboarding process

Improved trust and accountability with internal and external stakeholders

Established process for rapid and successful customer onboarding

Reduced opportunity cost and improved revenue recognition

Based on our research, we developed a list of potential improvements that could be made. Through further analysis using a proprietary tool and unique methodology, our recommendations culminated in an innovation roadmap for the long-term improvements. This enabled the company to appropriately plan and budget for them moving forward.

However, innovation does not always have to be a significant investment. We also worked with key stakeholders and cross-functional teams to co-design and deliver quick win improvements to the onboarding process. Based on our recommendations, the company is empowered to evolve and mature these minimum viable products over time while experiencing the immediate benefit of implementation.

Throughout the engagement, the team members were directly involved in the process. As a result of the collaboration throughout design and implementation, they had a clear understanding of their problem, were committed to solving it, and worked directly with Navigate to accelerate the process.

> "Navigate's Design Thinking Team helped us to implement both short- and long-term fixes to our customer onboarding process. With an improved process, we have reduced the customer opportunity cost and improved revenue recognition."
>
> *- Senior Executive*

OUTCOMES

Transformation – and the Design Thinking process in particular – can be seen as disruptive and therefore intimidating. By implementing quick wins and outlining short- and long-term improvements, the team experienced incremental successes while working toward breakthrough solutions.

As a result of the empathetic approach facilitated through Design Thinking, their onboarding process is now more than just an administrative function, it has humanized their brand and enabled a concierge-level of service that benefits both the business and their customers.

Shared understanding of customer expectations	Improved cross-functional collaboration	More transparent onboarding process	Improved trust and accountability with internal and external stakeholders	Established process for rapid and successful customer onboarding	Reduced opportunity cost and improved revenue recognition

CONTACT US TODAY TO GET STARTED

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For more information about our Design Thinking Services, visit our website.