



**High-Yield Methods**  
*A world leader in Outside-In planning & process.*

# **HYPER-PLANNING V3.0**

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# CONTENTS

Contents .....	2
Introduction .....	3
Pre-planning Steps.....	4
Additional research:.....	4
Company alignment maturity modeling:.....	4
Selecting your cross-functional planning team:.....	5
Setting key parameters: .....	6
The Hyper-Planning Session.....	7
Day one topics.....	7
Customer expectations:.....	7
Day two topics .....	10
Customer Needs: .....	10
Opportunity Identification:.....	11
Customer-centric Strategies:.....	11
Sample outcomes .....	12
Completion .....	14
Wrap-up .....	14
Further qualifying opportunities:.....	14
Final presentation:.....	14

## INTRODUCTION

**H**yper-Planning is an intensive, two-day, management planning regimen designed to help clients develop and articulate customer-centric strategies. Because of his depth of experience in development of successful, customer-centric business strategies—and the critical role facilitation plays—HYM Principal Dick Lee personally



H/P's management session lasts only 2 days

leads all Hyper-Planning sessions. Dick has applied his planning talents with clients including: 3M Company, American Express, US Bank, GE and Microsoft—along with hundreds more companies of all sizes, including many in the SME (small to medium enterprise) space.

Although we tailor every Hyper-Planning program to suit our client's business, especially in terms of relative time spent on each planning step, we rarely stray from the prescribed planning sequence, which is the heart of the

approach. Maintaining this sequence enables us to expedite planning while still drilling down to the level of detail that flushes opportunities to the surface. We've outlined these sequential steps in the following pages, along with a brief explanation for each primary step.

How can we accomplish such an ambitious program in only two days? Because we stage the planning prep work—gathering all anecdotal and statistical information, conducting customer research (if more research needed) and maturity modeling—up front. Post-planning we prepare a detailed write-up, an executive summary presentation and a high-level look at potential implementation issues. This staging allows executives to focus on executive decision-making rather than getting tangled up in executional issues.

## PRE-PLANNING STEPS

The up-front tasks involved will require roughly a month to six weeks to accomplish, respecting that those involved in doing this advance work have other full-time jobs. If our client plans to conduct new customer research, that will take additional time.

### **Internal information:**

Although we prefer not to base Hyper-Planning entirely on anecdotal input, we learn a tremendous amount by interviewing customer contact staff and front office management as well. We also avail ourselves of any and all statistical research—whether CSAT, VOC, Kano studies or NPS. However, we do like to review survey, analysis and interpretation methods to weed out information that may not be sufficiently objective or accurate. Our research partner, Mangen Research Associates, takes charge of this step.

### **Additional research:**

Depending on your base of customer information, we may suggest additional statistical or qualitative (interview) research to provide a clearer, multi-faceted picture of customers. We will clearly present needs and the value of additional study, and you decide how to proceed.

### **Company alignment maturity modeling:**

HYM is licensed to administer the Company Alignment Maturity Model Instrument, developed by CAMMI Logic. Although this step is optional, we strongly encourage clients to take the assessment so we can set baselines and identify organization strengths and weaknesses that could affect efforts to become more customer-centric. Fortunately, CAMMI is not a major budget factor.

## Selecting your cross-functional planning team:

Becoming more customer-centric requires cross-functional thinking, rather than trying to improve customer experience one function at a time. Selecting the optimal team members contributes greatly to the Hyper-Planning's outcomes. H/P planning teams should consist of two groups: *core team members*, who are present throughout the session; and *resource team members* on stand-by who will be included when their respective functions are discussed. *Core team members* should typically include:

- Chief Customer Officer (if present)
- COO (or senior ops manager)
- VP Administration (or senior admin manager)
- CFO (or senior finance manager)
- VP or Manager of Customer Support/Customer Service
- VP or Manager of Customer Relations/CRM/CEM
- VP Sales
- VP Marketing
- VP (or senior IT manager)<sup>1</sup>
- VP HR (or senior HR manager)<sup>2</sup>
- Executive Manager (optional)<sup>3</sup>

We strongly prefer to limit core team membership to ten, but we can work with a couple more if that's prudent in your situation. Your *stand-by resource team* should include, among others:

- Director of Research
- Marketing managers

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<sup>1</sup> Almost every customer-centric business strategy requires some form of technology support. Having the senior (or a senior) IT manager present creates important buy-in to the overall team's decisions.

<sup>2</sup> Becoming more customer-centric almost always requires at least some organizational change.

<sup>3</sup> Only necessary if the core team does not include a senior manager member whose recommendations on behalf of the team will carry very substantial weight with the CEO (or Division President, if it's a single division initiative).

- Social media manager
- Sales reps
- Contact center supervisor
- Contact center reps
- IT applications manager
- IT network manager
- Logistics manager (if present)
- Supply chain or procurement manager (if relevant)
- A/R manager

**Agency involvement:** Please note that we strongly resist participation in H/P by outside advertising agencies or direct marketing agencies. Both have vested interests in maintaining their budgets status quo, and moving towards customer-centricity almost always shifts funds from broad-based, wide appeal marketing and even more targeted promotional communication into customer relationship development and customer retention efforts, for which agencies offer scant support.

### **Setting key parameters:**

Last but not least, prior to starting the two-day intensive sessions we need to work with you to set some key parameters that may influence the planning team's work and ours as well.

- **Identify boundaries:** A necessary pre-planning component is determining boundaries that may limit what the planning process should consider. A common examples are regulatory restraints and "safe growth" limitations.
- **Anticipate risk factors:** Because adopting customer-centric strategies virtually always requires some internal changes, we like to openly discuss with clients their organization's change profile and risk tolerance.

## THE HYPER-PLANNING SESSION

**W**henever practical, we prefer holding Hyper-Planning sessions offsite at a nearby conference center or hotel, unless high quality video conferencing is available (important for pulling in resource members).

### *Day one topics*

As you'll realize from a quick glance at day-one topics, Hyper-Planning sessions are highly compressed and move very quickly. Also, achieving the compression necessary to complete HY/P in two days requires skilled, objective facilitation.

The topics for both days are distributed prior to the meetings, and team members should spend time organizing their perspectives before we meet. We also encourage informal discussions among participants *prior* to the meetings.

Another good preparation approach that's feasible in some business sectors is team members conducting sample transactions with their company, including web visits.

### **Customer expectations:**

*The only marketplace reality that matters is what customers perceive.* Among the key perspectives we discuss are:

- Self-identified customer groups
- Utility of their purchases (what need are they filling?)
- Their perception of product/service categories for your products/services
- End-to-end purchase cycles, starting with perceiving a need
- Where they prefer to buy (place)
- Competitive options (including from different categories)
- Product/service quality expectations
- Service expectations

- Price expectations
- Relationship expectations
- Communication expectations
- Product/service delivery
- Accuracy of warranties and representations
- Brand influence
- Number and quality of touch points

### **Comparing customer expectations to customer experience**

We compare customer expectations with with the prior list of what customers perceive you're providing. We also identify | gaps between customer perception and internal perceptions to identify where perceptions *may* conflict with reality.

### **Drill-down customer product/service assessment:**

Drilling down to the details that make up customer experience takes an important step towards identifying how policies and process have to change to elevate customer experience.

- Product/service features (what matters to customers versus what doesn't)
- Customer service policies/performance
- Packaging/bundling
- Sales channels

### **Customer MOTs (moments of truth)<sup>4</sup>**

MOTs, which include major "pain points," represent interactions along the customer experience continuum that contribute most to:

- Customer loyalty
- Sales cycle progression
- Willingness to recommend to others
- Willingness to expand relationship
- Customer attrition

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<sup>4</sup> HYM defines MOTs relatively tightly. We reserve this designation for interactions that substantially affect customer experience.



- Sales cycle abandonment
- Corporate bureaucracy
- Disappointment
- Customer frustration
- Customer confusion
- Viral support/attacks
- Other factors influencing overall customer experience

### **Mitigating factors**

Companies can't always readily control or control at all significant direct or indirect influences on customers. However, recognizing and compensating for (or encouraging) them is vital to setting strategies. Specific areas we examine, if relevant, include:

- Supply/demand
- Customer life cycle
- Product life cycle
- Market trends
- Regulatory issues—both current and anticipated
- Direct competition
- Alternative category (indirect) competition
- Competitive strengths and weaknesses
- Sustainable advantages
- Competitive sources of new business
- Share of customer attention
- Opportunities to “change the rules”

### **Internal resources & conditions:**

Some or all of these factors may enhance or detract from customer relationships and customer opportunities.

- Company values
- Variable compensation that influences staff behavior

- System and software support
- Customer information management
- Staff quality
- Staff training
- Other influences

### ***Day two topics***

Depending on how day one progresses, we may have to include the “internal resources” and/or “mitigating factors” discussions on day two. However, we prefer to allow as much “slack time” as possible during the second day to allow for outside-the-box thinking and creativity using the information flushed up in day one.

#### **Segmenting your customer base:**

Segmentation options include:

- Business and household demographics
- Psychological profiling (such as risk tolerance for financial institutions)
- Objects of purchase
- Positive MOTs
- Pain points
- Depth, breadth of relationships
- Choice of sellers
- And others germane to specific companies and sectors

#### **Customer Needs:**

At this point, Hyper-Planning adds to analytical thinking a strong creative component. Customer segmentation creates customer groupings—some discrete, more overlapping—to use as a base for identifying opportunities. *Fact-based creative thinking produces far more insightful outcomes than taking stacks of data and imagining how they could be used—or just imagining in brainstorming sessions. Hyper-Planning’s “day one” followed by customer segmentation provides the solid platform required to spur effective and relevant creative thinking.*

Developing many of the transformational strategies Hyper-Planning has produced required sifting through customer, market and company information to find the connectivity that sparks new thinking. The first “creative” step is rethinking customers wants, needs and preferences, including:

- Expressed wants, needs and preferences
- Potential (subliminal) wants, needs and preferences
- Possibilities customers aren’t expecting or thinking of that could create new purchase patterns

### **Opportunity Identification:**

Opportunities come in many shapes and sizes, but almost all come from a finite list of sources. At this point in the process, we’ve flushed up a tremendous amount of information in orderly fashion, which creates a group capability to evaluate opportunities of each type:

- Increasing customer retention
- Winning greater customer share
- Acquiring new customers
- Expanding horizontally into new product/service categories
- Expanding vertically by add-on products/services
- Expanding geographically into new markets
- Improving distribution design and channel relationships
- Inventing new product categories with disruptive potential

Factors ranging from enhancing customer experience to reducing service cycle time to improving customer information management all relate to one or more of these opportunity types. Linking them helps identify options and screen out “temptations” that aren’t opportunities.

### **Prioritize opportunities:**

Based on relative opportunity size, capabilities and cost to capitalize on opportunities and internal capacity for change—as a group we agree on recommended priorities.

### **Customer-centric Strategies:**

**Go-to-market strategies:** From a distance, you might suspect this last step would be a climactic outcome to two tough days of work. However, in most cases, the “magic” has already occurred, the breakthrough thoughts are already on the table, and we’re starting to put flesh on the bones.

Although the Hyper-Planning process will drive follow-on planning in any of a number of different functional areas responsible for executing your customer-centric strategies, your cross-functional planning team has clearly set the direction while also setting high-level expectations.

### ***Sample outcomes***

Hyper-Planning often produces transformational thinking that breaches the boundaries of current wisdom. These examples characterize H/Y outcomes.

- Changing a focus on high-value potential prospects to building share-of-wallet across a broad customer base
- Shifting lending strategies from expanding credit-line portfolios to “term-lines” for repayment of outstanding credit balances with other lenders
- Replacing efforts to push product through safety equipment distributors with educational programs encouraging architects and engineers to specify our client’s products.
- Stopping the national launch of a consumer service that turned out to be a solution in search of an opportunity
- Bundling a set of low-perceived value industrial supplies into a new approach to mechanical design
- Spreading customer experience focus from points of direct contact across all supporting functions
- Correcting a poisonous customer service problem by addressing the root causes—in manufacturing and procurement.
- Our client winning “vendor of the year” award from a hard-bitten manufacturer/retailer for proactively setting up co-op marketing programs with third-parties to blunt onerous demands for direct subsidies
- Halting introduction of a corporate, psychological testing instrument because too many in HR perceived a risk of spurious, job applicant EEOC lawsuits
- Changing a client’s self-perception from a manufacturing company with direct sales to a knowledge-based service company offering a mix of internally manufactured and outsourced products.

*After applying Hyper-Planning, most of our clients realize multiple outcomes like these—all contributing to the conducting business in a more customer-centric manner.*

## COMPLETION

Once we've prioritized strategies and wrapped up the two-day "intensive," we work together with the one or two team members to take several important steps that will complete the customer-centric planning cycle. Before breaking, the team should designate two (or more) people for us to partner with on subsequent activities.

### *Wrap-up*

#### **Further qualifying opportunities:**

Almost invariably, new subjects or unexpected potential opportunities pop up during Hyper-Planning team sessions. Some will require further investigation—either through interviews and conferences and occasionally formal research (we rarely hold up progress reporting on the overall findings, but amend them once research is completed instead).

#### **Final presentation:**

With team input, HYM customarily creates a management presentation deck outlining key discoveries and recommendations. Subsequently, the planning team as a whole typically presents to the CEO (or appropriate executive group) to gain buy-in and a charter to implement. The planning team and HYM together typically present to senior management.

#### **High-level implementation assessment:**

Although full implementation planning must wait until process design aligns process to strategies and technology is aligned with process, many client executives ask to see a high-level plan that outlines possible changes. Although these preliminary plans are not roadmaps, they do appraise in general terms the magnitude of changes

required to become customer-centric and help management anticipate the road ahead. Taking the [CAMMI Assessment](#) provides an excellent baseline for projecting change.