



Experience Strategy and Design

Voice of the Customer
Journey Management
Experience Design
ADA Strategy and Adherence



Prudential

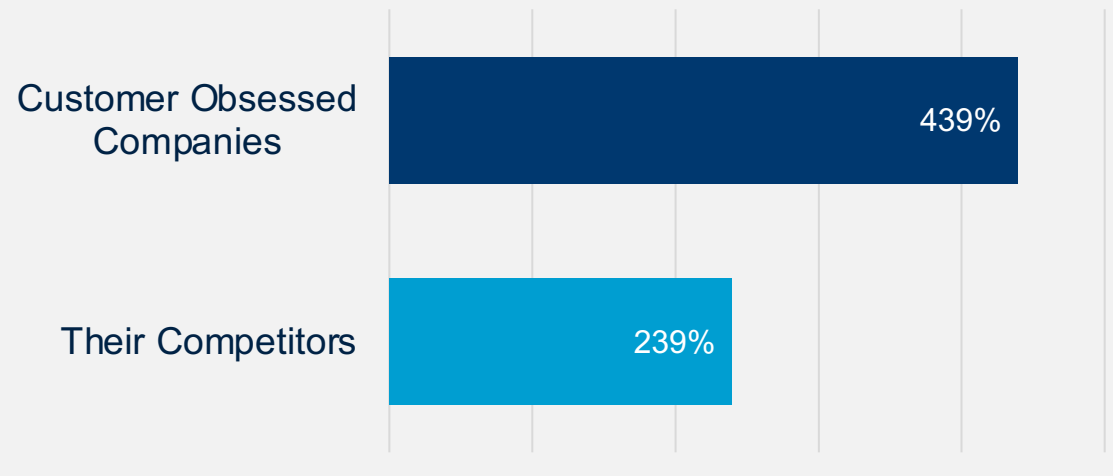


The facts about customers

- Customers are the key to transforming our category
- Customer satisfaction is the most reliable indicator of long-term profitability and growth



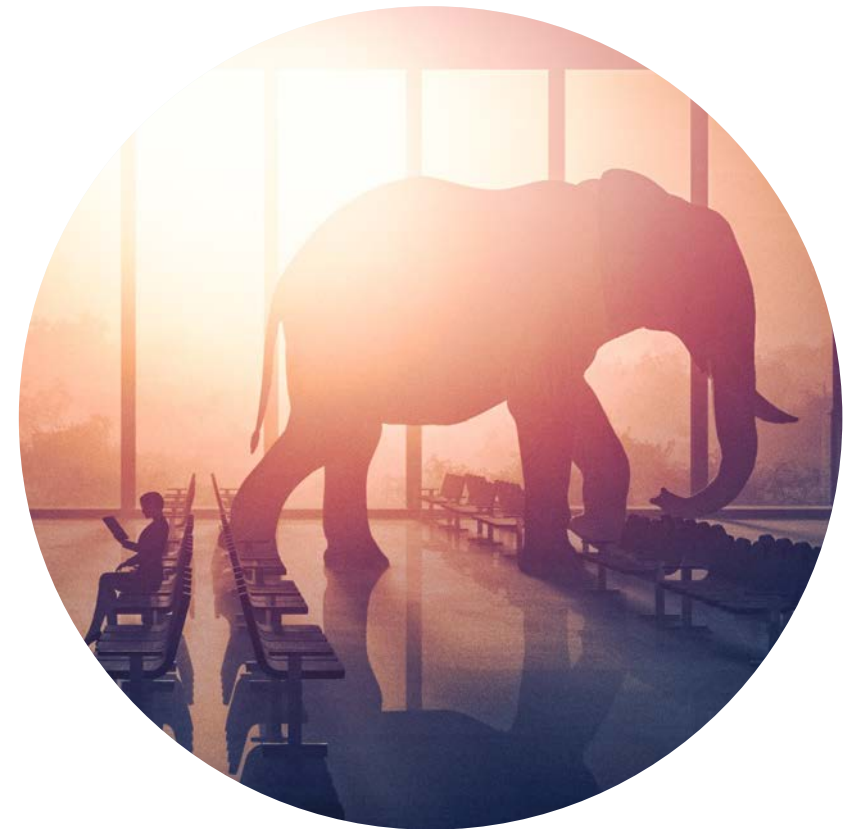
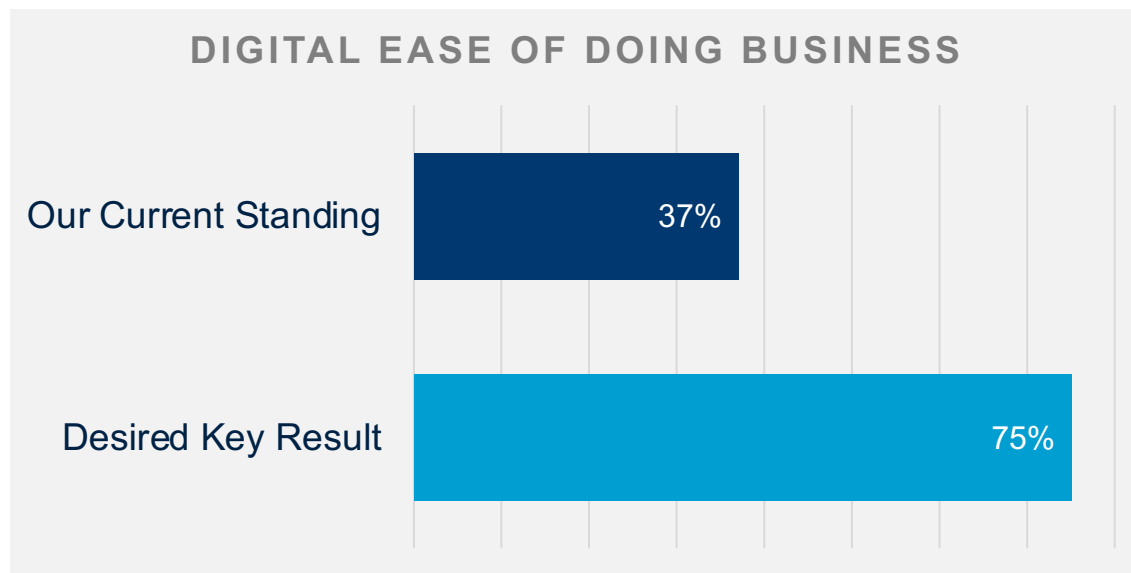
MARKET CAP GROWTH 2010-PRESENT





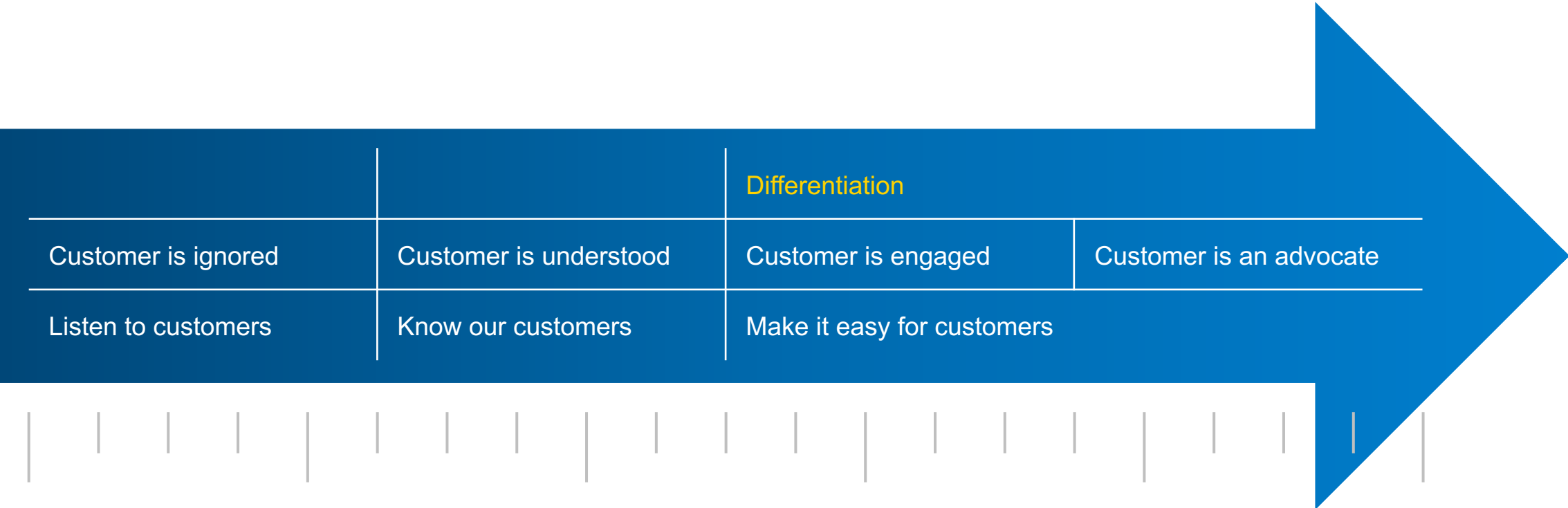
Where we stand

- Customers struggle with our complexity and inconsistency
- Poor customer experience costs us billions
- Customer Obsession will drive our success





Our maturity



Customer obsession is measured in phases of maturity where our own internal challenges must be overcome with sustained effort over time.



Our challenges



Indifference

- Employees lack connection to customers and aren't empowered to improve our relationship with them

Misalignment

- Customer metrics are unevenly gathered, understood, and adopted
- Customer Journeys are unmapped, unmaintained, and underutilized

Mediocrity

- Experiences fail customers without human-centered design and research

Inequity

- Unmet ADA standards impair customers, cost us business and damage our brand



We have the passion and energy to lead with customer insights and analytics.

We have the talent and skills to become...



Obsessed



Voice of the Customer

- Develops and delivers a tiered training program to Prudential employees so they may understand their role in customer obsession and account for customer outcomes
- Owns Prudential's VoC program including listening assets and channels, methodology, and standards
- Supports all businesses and functions and adds appropriate channels to provide a true view of priority end-to-end journeys
- Synthesizes and analyzes feedback; stored centrally, studied across channels, and prioritized by volume, value, and emotion
- Shares results across the enterprise leveraging best practices and determining the optimal mix of self-service, pushed, and ad-hoc reports



Aligned



Journey Management

- Drives the interconnectivity across VoC, Journey Management, Experience Design, business units, customers and experiences
- Governs the end-to-end journey evaluation focusing on assessment of the number of customers impacted, financial impact and degree of customer pain or gain
- Identifies common participant interactions across experiences allowing for discovery of insights by proxy and opportunities for interconnectivity in the design of scalable solutions



Exceptional

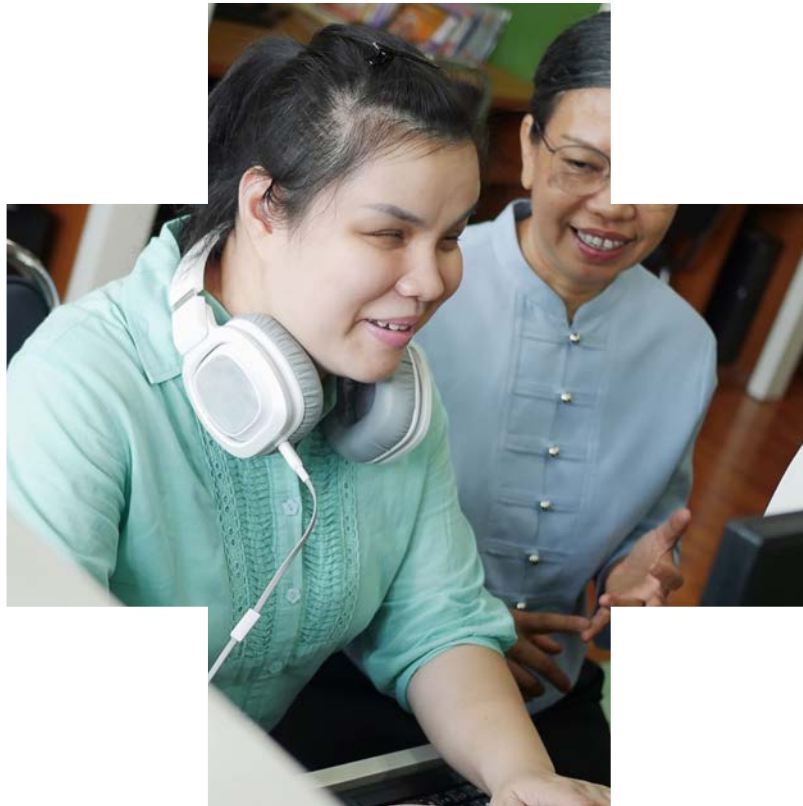


Experience Design

- Owns the human-centered design methodology and UX research and analysis across the enterprise, helping to define and design what matters to customers
- Leads the Experience designers embedded in our company-wide agile teams collaborating with stakeholders. business, content, and technology
- Reduces delivery time and defects by utilizing design principles, employing customer feedback, and prototyping and testing with customers
- Establishes and maintains Prudential's design system, ensuring that experiences are in brand, mobile optimized and accessible



Equitable

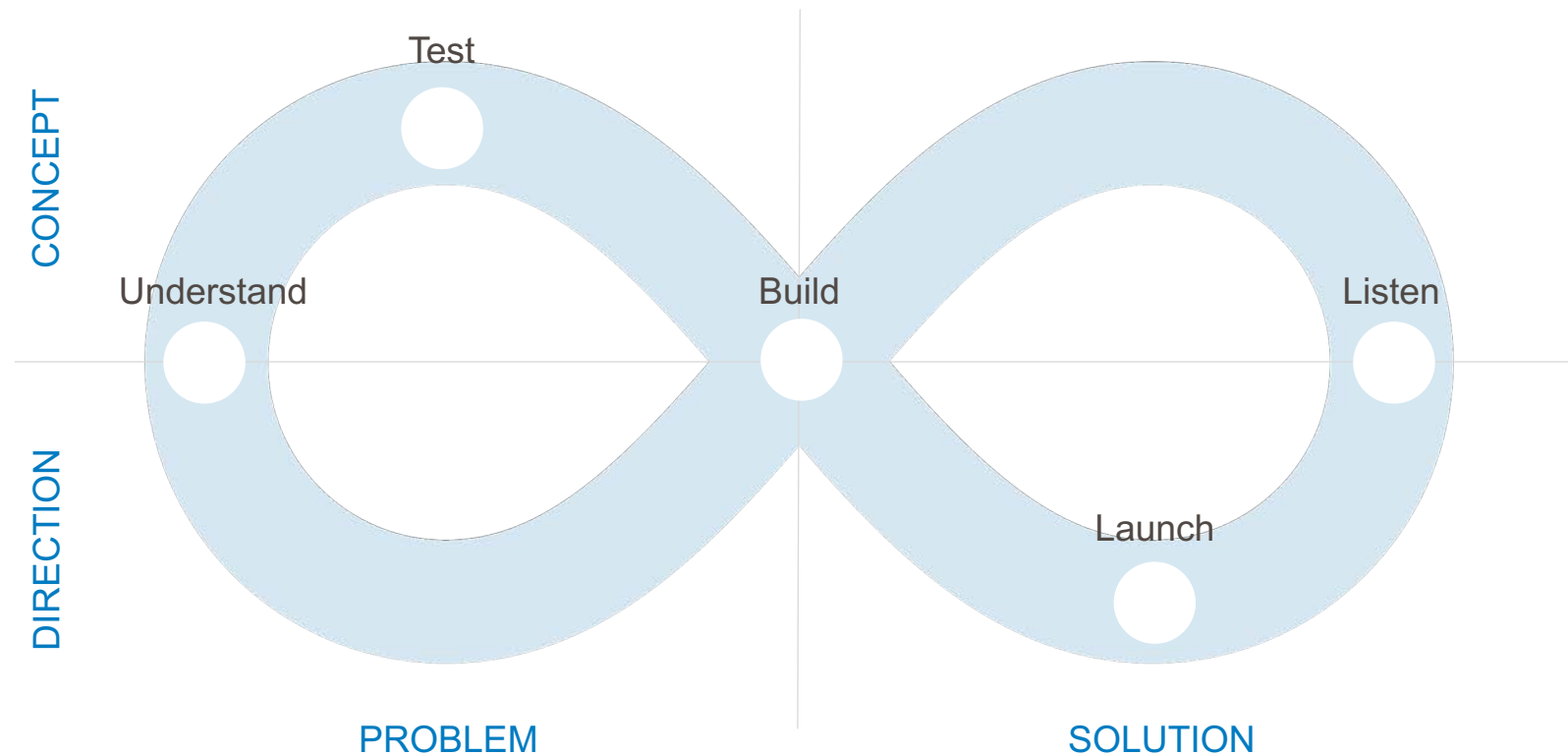


ADA Strategy and Adherence

- Drives widespread adoption of ADA/WCAG to producers and owners of digital content to meet and maintain our ADA Enterprise Standard
- Provides a consistent support and training model related to the ADA/WCAG guidelines, background, scope, requirements, definitions and exceptions
- Maintains site inventories with responsibility for bringing our legacy assets up to compliance, identifying and closing gaps and implementing process improvements
- Promotes practices that reduce future costs, allows for a repeatable process and an increased speed to market



Strategy & design process



Voice of the Customer

- Coaches customer mindset
- Collects and analyzes customer data
- Identifies challenges and opportunities

Journey Management

- Drives interconnectivity
- Governs journey evaluation
- Identifies commonalities

Experience Design

- Facilitates discovery
- Performs research
- Designs experiences

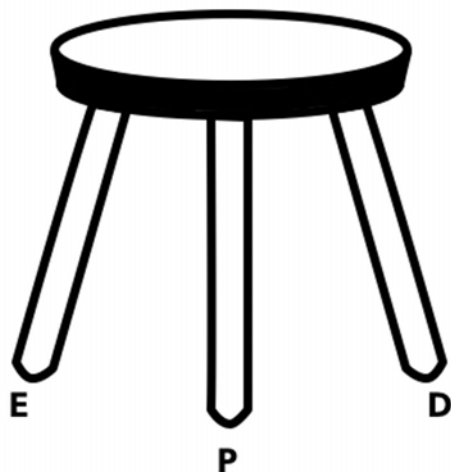
ADA Strategy and Adherence

- Maintains standard
- Establishes success criteria
- Tracks compliance

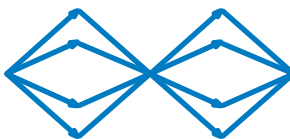
Our agile team members activate specialists from the broader XD team to sense and respond to customers creating exponentially better outcomes over time



Dual track agile framework



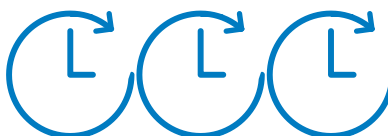
Engineering, Product, and Design work together as equal partners on agile teams along *dual tracks*.



DISCOVERY

Design exploration, experimentation, and testing are always one step ahead of development. Discovery ensures that product development is cross-disciplinary, low-risk, and high-value to customers and the business.

Research	Explore	Prototype
----------	---------	-----------



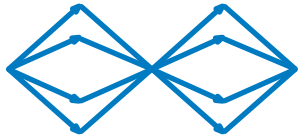
DEVELOPMENT

Designers collaborate closely with POs and Devs following Lean principles. The team optimizes customer fit by learning from customers as they launch defining and measuring value as they build.

Pilot	Launch	Optimize
-------	--------	----------



Discovery process in detail



The Design Thinking methodology will yield differentiated and distinctly Prudential products and services

2-4 weeks

2-5 Days Design Thinking Workshop or Design Sprint

6-8 weeks

Research & Plan

Develop a business case and research to gain insights into the opportunity



Define

Determine key needs and insights and uncover opportunities to solve



Create

Generate ideas and experiences that address user insights and needs



Refine

Design, create, and test solution with customers and associates

Post Workshop

Define and develop a go-to-market MVP for launch and future optimization



Research & Plan

Establish teams to develop a business case and conduct upfront customer research to gain insights into the opportunity

Lead: VOC, XS, Business, CPO

Support: XD, Marketing Insights, Technology

- VoC insights
- Business case/canvas
- Customer archetype
- OKRs and KPIs
- Customer data, insights and segments
- Current-state customer journey
- Establish team and cadence
- Assess ADA impact



TOOLS & TEMPLATES

Business case

Agile training/toolkit

Team working agreement

AGILE INTEGRATION

Agile Team agreement

PHASE GATE REQUIREMENTS

Business Case

Journey map & Insights

Personas



Explore & Ideate

Complete activities that lead to true customer insights and generate new ideas

Lead: XS & XD, Business, CPO
Support: Technology

- Competitive research
- Field research
- Experience benchmarking
- Sales proposition
- Design sessions
- Sketching
- Future-state customer journey
- Measurement framework
- ADA requirements



TOOLS & TEMPLATES

Design Thinking guide
Research methodologies
XD Measurement framework
User journey template
Information Architecture

AGILE INTEGRATION

Epic Identification
Sprint Zero

PHASE GATE REQS

XD Measurement framework
Journey Map and Insights



Prototype

Build a testable prototype and define a testing plan

Lead: XD

Support: XS, CPO, Business, Technology

- Review XD/UX patterns
- Storyboard and build prototype
- Test plan development
- ADA test plan



TOOLS & TEMPLATES

Experience Principles
Prudential UX Pattern Library
Testing plan template
XD or other prototyping tools

AGILE INTEGRATION

Sprint zero
Spike planning
Story Mapping
Agile release planning
UX pattern selection,
implementation and evolution

PHASE GATE REQS

Customer Insights & UX Testing plan



Pilot

Build a pilot that can be tested and continue iterating

Lead: XD & XS, CPO

Support: Technology, Business

- Define MVP
- Refine prototype
- Initial testing
- Iterate and retest
- ADA test



TOOLS & TEMPLATES

User Zoom

Adobe Target

XD for Design Assets

AGILE INTEGRATION

MVP

Sprint Review

PHASE GATE REQS

Ongoing Performance Metrics Plan

Pass ADA requirements



Launch

Deploy customer solutions in market and continue to test and learn

Lead: Technology, CPO

Support: XD & XS, Marketing Insights, Business

- Deliver the MVP to market by working quickly and iteratively via Sprints
- Validate product via QA, ADA, and Stakeholder testing
- Gather performance metrics



TOOLS & TEMPLATES

Adobe Target

Mouseflow

Adobe Campaign Manager

Medallia

AGILE INTEGRATION

Sprint Review

PHASE GATE REQS

Ongoing Performance Metrics Plan



Optimize

Review, reflect, and optimize

Lead: VOC, XD, CPO

Support: Business, Technology

- Analyze performance metrics
- Generate new insights
- Test hypotheses
- Perform Agile retrospective
- Plan improvements
- Iterate and submit UX patterns
- Capture ADA issues and add to backlog



TOOLS & TEMPLATES

Agile retrospective guide

Pattern library submission guide

Medallia

Mouseflow

Adobe Analytics

AGILE INTEGRATION

Sprint Review

Backlog grooming

PHASE GATE REQS

Ongoing Performance Metrics Plan



Appendix

	Research and Plan	Explore and Ideate	Prototype	Pilot	Launch	Optimize
Activities	<ul style="list-style-type: none"> • VoC insights • Business case/canvas • Customer archetype • OKRs and KPIs • Customer data, insights and segments • Current-state customer journey • Establish team and cadence • Assess ADA impact 	<ul style="list-style-type: none"> • Competitive research • Field research • Experience benchmarking • Sales proposition • Design sessions • Sketching • Future-state customer journey • Measurement framework • ADA requirements 	<ul style="list-style-type: none"> • Review XD/UX patterns • Storyboard and build prototype • Test plan development • ADA test plan 	<ul style="list-style-type: none"> • Define MVP • Refine prototype • Initial testing • Iterate and retest • ADA test 	<ul style="list-style-type: none"> • Deliver the MVP to market by working quickly and iteratively via Sprints • Validate product via QA, ADA, and Stakeholder testing • Gather performance metrics 	<ul style="list-style-type: none"> • Analyze performance metrics • Generate new insights • Test hypotheses • Perform Agile retrospective • Plan improvements • Iterate and submit UX patterns • Capture ADA issues and add to backlog
Disciplines and Roles	<p>Lead: VOC, XS, Business, CPO</p> <p>Support: XD, Marketing Insights, Technology</p>	<p>Lead: XS & XD, Business, CPO</p> <p>Support: Technology</p>	<p>Lead: XD</p> <p>Support: XS, CPO, Business, Technology</p>	<p>Lead: XD & XS, CPO</p> <p>Support: Technology, Business</p>	<p>Lead: Technology, CPO</p> <p>Support: XD & XS, Marketing Insights, Business</p>	<p>Lead: VOC, XD, CPO</p> <p>Support: Business, Technology</p>
Tools and Templates	<ul style="list-style-type: none"> • Business case • Agile training/toolkit • Team working agreement 	<ul style="list-style-type: none"> • Design Thinking guide • Research methodologies • XD Measurement framework • User journey template • Information Architecture 	<ul style="list-style-type: none"> • Experience Principles • Prudential UX Pattern Library • Testing plan template • XD or other prototyping tools 	<ul style="list-style-type: none"> • UserZoom • AdobeTarget • XD for Design Assets 	<ul style="list-style-type: none"> • Adobe Target • Mouseflow • Adobe Campaign Manager • Medallia 	<ul style="list-style-type: none"> • Agile retrospective guide • Pattern library submission guide • Medallia • Mouseflow • Adobe Analytics
Agile Integration	<ul style="list-style-type: none"> • Agile Team agreement 	<ul style="list-style-type: none"> • Epic Identification • Sprint Zero 	<ul style="list-style-type: none"> • Sprint zero • Spike planning • Story Mapping • Agile release planning • UX pattern selection, implementation and evolution 	<ul style="list-style-type: none"> • MVP • Sprint Review 	<ul style="list-style-type: none"> • Sprint Review 	<ul style="list-style-type: none"> • Sprint Review • Backlog grooming
Phase Gate Requirements	<ul style="list-style-type: none"> • Business Case • Journey map & Insights • Personas 	<ul style="list-style-type: none"> • XD Measurement framework • Journey map and Insights 	<ul style="list-style-type: none"> • Customer Insights & UX Testing plan 	<ul style="list-style-type: none"> • Ongoing Performance Metrics Plan • Pass ADA requirements 	<ul style="list-style-type: none"> • Ongoing Performance Metrics Plan 	<ul style="list-style-type: none"> • Ongoing Performance Metrics Plan