

CASE STUDY

Power Up Your CX Engine with Skill Sets You Already Have



Overview

You've read strategy books, watched TED Talks, and skimmed articles that all say the same thing — customer experience (CX) is critical to long-term business success. Since customers often base their decisions on experience more than anything else, companies must offer great CX. However, understanding the importance of CX is often the easy part of the equation. Taking proactive steps to build an effective, results-driven CX engine is the more daunting challenge — and many organizations don't even know where to start.

A few years ago, Nelnet took on this challenge. Our solution was to take stock of the skill sets we already had in house with our existing design team, and gradually evolve and reorganize them into what has now become a powerful, specialized CX engine.

Your organization may be poised to take similar steps toward creating a dedicated CX strategy and team, using capabilities you already have. Learn how we strengthened our collaboration muscles, restructured key roles, and refocused our mindset to help Nelnet deliver extraordinary customer experiences.

User Experience vs. Customer Experience



User Experience (UX): A person's emotions and attitudes about using a particular product, system, or service



Customer Experience (CX): The sum of all engagements a customer has with a company in each touch point throughout the customer lifecycle



Approach

The evolutionary process that led to Nelnet establishing a dedicated CX team began with just one designer and one developer, tasked with building customer-facing websites. After a period of steady growth, a major milestone was the creation of a design leader position. This new role gave design an equal seat at the table with business stakeholders, marketing, and development and helped the organization be more intentional about improving user experience (UX). From this point on, the design team became increasingly skilled at collaborating with other groups and leaders across the organization.

Over the next several years, the team grew strategically, first by identifying gaps where roles needed to be filled and second, by pulling in specific skill sets. Collaboration intensified as the team set up processes that helped drive all the components that go into creating a superior end product, including visual design, interface design, and copy and content.

The team then added UX research capabilities to help understand what users are thinking and feeling, perform usability testing, and support data-driven design. Around the same time, the organization implemented Agile methodologies, which was a great fit for a collaborative, cross-functional approach to getting things done.

These actions eventually led to the organization taking steps to rethink, reorganize, and power up a formal CX engine that supports Nelnet’s core value of *Providing Superior Customer Experiences*.

Results

The design team rebranded itself as the **Unifi Design Studio** in 2019 and took on a new mandate of improving CX at Nelnet. The evolution of the team over the years provided all the competencies needed to work toward that goal.





These competencies are critical for a successful CX design team.



Design Thinking: An iterative process where assumptions are challenged from a user-centric perspective. The main stages of design thinking are: empathize, define, ideate, prototype, and test.



Research: Generates data to make good CX decisions through a set of repeatable, standardized research methods covering everything from usability, to market research, to voice of customer.



Visual Design: The use of imagery, color, shape, typography, and form to enhance usability and generate a positive emotional response.



Interface Design: Brings design thinking, research, and visual design together to create an experience that enables users to achieve their goal.



Process/Collaboration: Since CX is the sum total of a person's experience with a company, it's critical to have effective collaboration across business areas and a process that orchestrates it all.

New Focus, New Mindset - When evolving existing teams or people to focus on CX, it's important to trigger a deliberate mindset shift among members. From the start, leaders must take the time to identify and explain what each person's role means within the frame of CX. That is, it's not enough to simply tell someone "your role used to be 'this' and now it is 'this'." A mindset shift can take time and you will need to use a proactive, consistent approach to start your team off on a new course.

Conclusion

If your organization is currently at a CX crossroads, consider if you have an opportunity to explore a "repurpose and refocus" path — similar to the gradual evolution Nelnet experienced.

1. Consider if you already have many of the competencies needed to evolve your CX strategy.
2. Take stock of where you are now and where you want to be in 6 months, 1 year, or even 3 years.
3. Look for ways to evolve your existing skill sets (and identify gaps) to form a specialized CX team.

Nelnet's Unifi Design Studio applies advanced, best-in-class techniques to reveal critical customer insights, conduct objective experience research, and innovate through data-driven design. The studio employs experience-focused tools, technologies, repeatable processes, and capabilities to help support, inform, and visualize the complete customer experience to assist communication and strategic decision-making.

The success we've achieved with the Unifi Design Studio is just one of the ways Nelnet is leading by example. Visit nelnetinc.com/nds to learn how partnering with us can help transform your business.