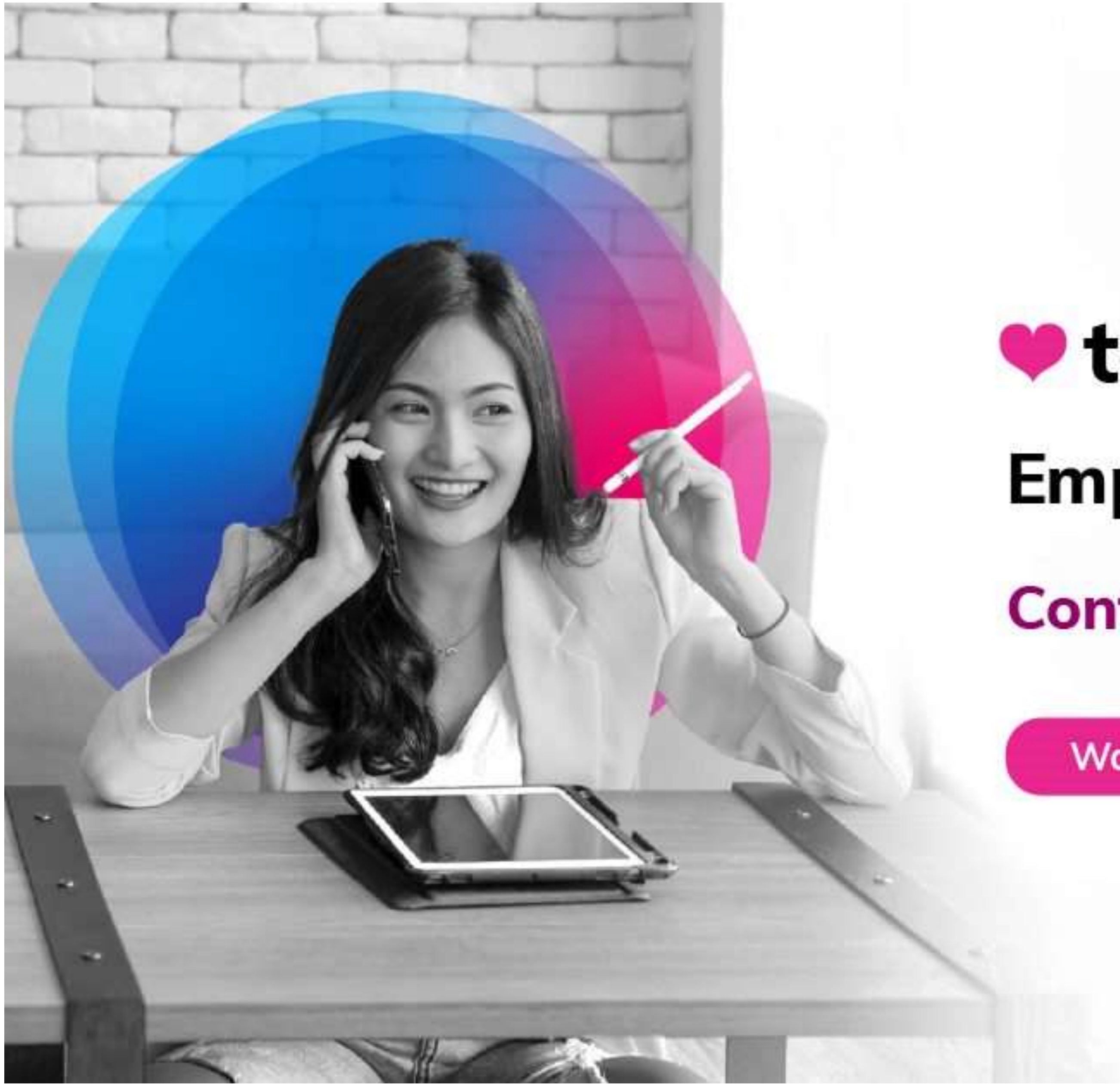

❤ to ❤ talk:

Empathy in the digital world.

Contact Center Webinar

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NICE · CXone

About the Workshop

NICE CXone provides these workshop materials for you to use in training your staff. They are designed to last approximately 60-90 minutes making them ideal for conducting over lunch or as a short refresher where needed. This workshop is about 75 minutes long.

The workshop can be delivered either in person or virtually. Activities sometimes have to be slightly modified depending on the delivery mode, but instructions are in the speaker's notes.

The **ideal number of participants** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldly. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors.

A **Participant Workbook** is provided. Print these out (black and white is fine) or email them to participants to print themselves. This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (in person or virtually). This tells people that the workshop is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to prepare two flip charts, chat pods, open answer poll questions, or whiteboards ahead of time. And be sure to circulate and talk to people, learning who they are and personally welcoming them as they complete this pre-workshop activity.

Introductions: Because this is a short workshop, no time was allotted for each participant to introduce themselves to everyone else. Introductions can easily take 20 minutes, and that's one-third of the time allotted for the entire workshop. Instead, use the pre-workshop activity time to circulate, learn who people are, and introduce them to people sitting nearby. Virtually, participants can introduce themselves in chat as part of the pre-workshop activity.

PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers notes beneath.

AUDIENCE

This workshop is appropriate for front-line agents handling customer contacts or for a group of stakeholders looking to empathize with customers and understanding them in more detail.

Preparing to Lead the Workshop

The **key factors for success** in the workshop are how comfortable you are with the material and inserting personal stories to help illustrate the content. To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker's notes a number of times over the first couple of days.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker's notes word-for-word. The notes provide background information for the trainer to make sure you are comfortable with all of the content.
- You also do not have to cover every bullet on every slide, and participants certainly don't need you to read them off the slide to them. For each tip, you can say here are some things you can do to support this tip, and then just highlight 2-3 of them. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

THE DAY OF THE WORKSHOP

If delivering in person:

- Make sure that the room is setup. If people are going to bring food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up two flip chart pages with the two questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of the workshop.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as two open-ended poll questions, a divided whiteboard, or two chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.

During the Workshop

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for "rabbit holes" that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participant think or if they would add anything to the tips. Many will already have experience with the topic and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each workshop to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.
- **"Nudge Your Neighbor" activities:** Keep these to just 60 seconds and then move on. People don't have to share with everyone the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training workshop, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE CXone has a number of short training workshops. Browse our catalog and choose your next topic.

Workshop Overview

Topic	Activity	Time Allotted	Materials
Introduction	Pre-activity Presentation	 2 min	PPT 5 PPT 6-7; PW 3
What is Empathy Mapping?	Presentation Nudge Your Neighbor	15 min 1 min	PPT 8-15; PW 3-6 PPT 16
Before Beginning	Presentation Nudge Your Neighbor	10 min 1 min	PPT 17-21; PW 6-7 PPT 22
Creating the Map	Presentation Nudge Your Neighbor Small Group Activity	10 min 1 min 25-35 min	PPT 23-26; PW 8-9 PPT 27 PPT 28-29; PW 9-10
Close	Review Action Plan Final Comments	3 min 5 min 1 min	PPT 30-31 PPT 32; PW 11

Total Time = 75-85 min PPT = PowerPoint Slide PW = Participant Workbook

Welcome!

Once you get settled, answer these questions:

Why is empathy so important to customer service?	What do you hope to get out of this workshop today?

Empathy Mapping

A Training Workshop

Course Overview

The **goal** of this course is to understand how to create an empathy map and then what to do with the information learned from the experience

- Introduction and overview
- What is empathy mapping?
- Before beginning
- Creating the map
- Close

What is Empathy Mapping?

Empathy

The experience of understanding another person’s condition from their perspective. You place yourself in their shoes and feel what they are feeling.

Empathy “fuels connection” and is what makes customers stick.

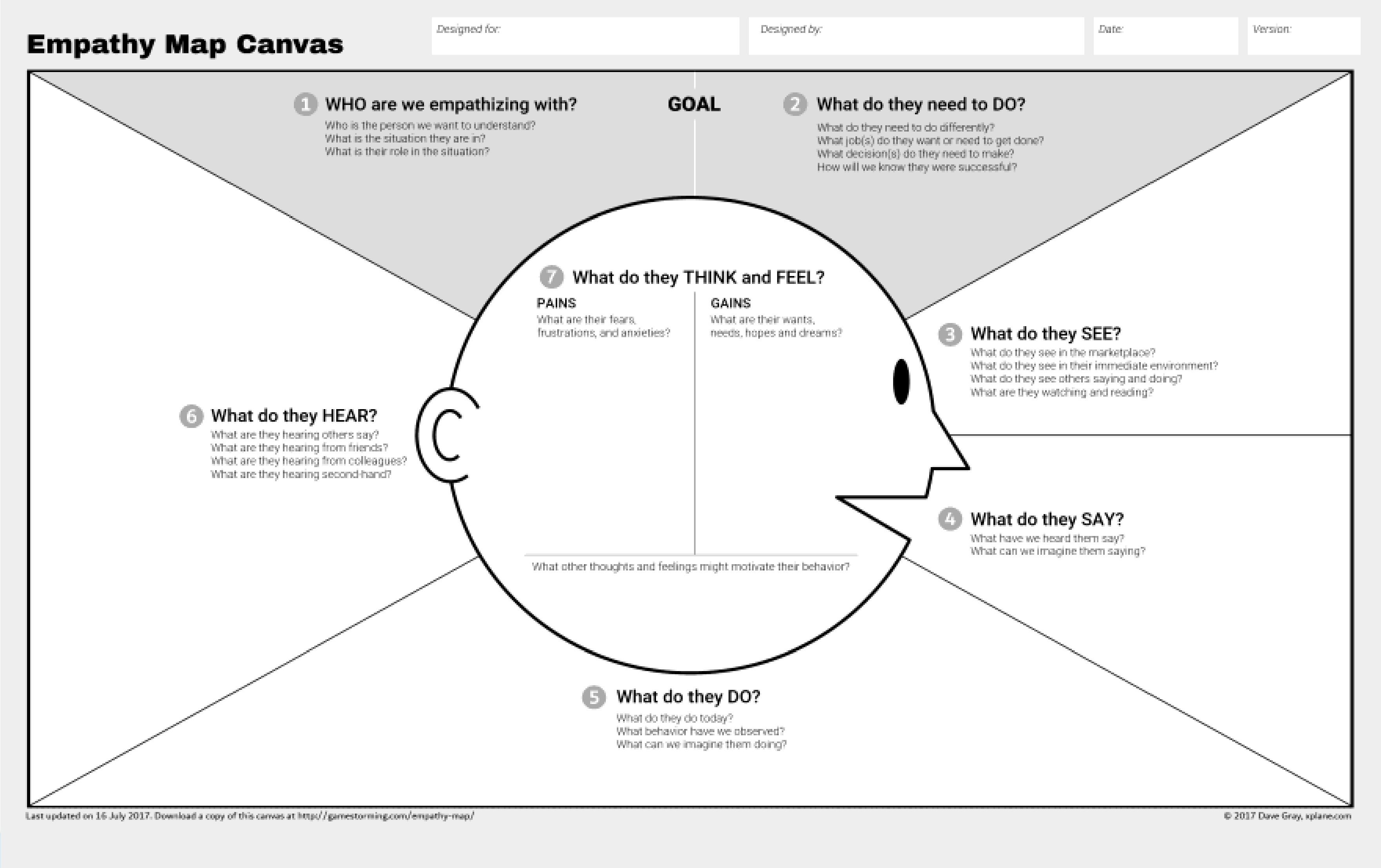
Empathy Mapping

A collaborative process used to visualize and articulate what an organization knows about a particular audience. It externalizes knowledge about a specific audience in order to create a shared understanding of their needs.

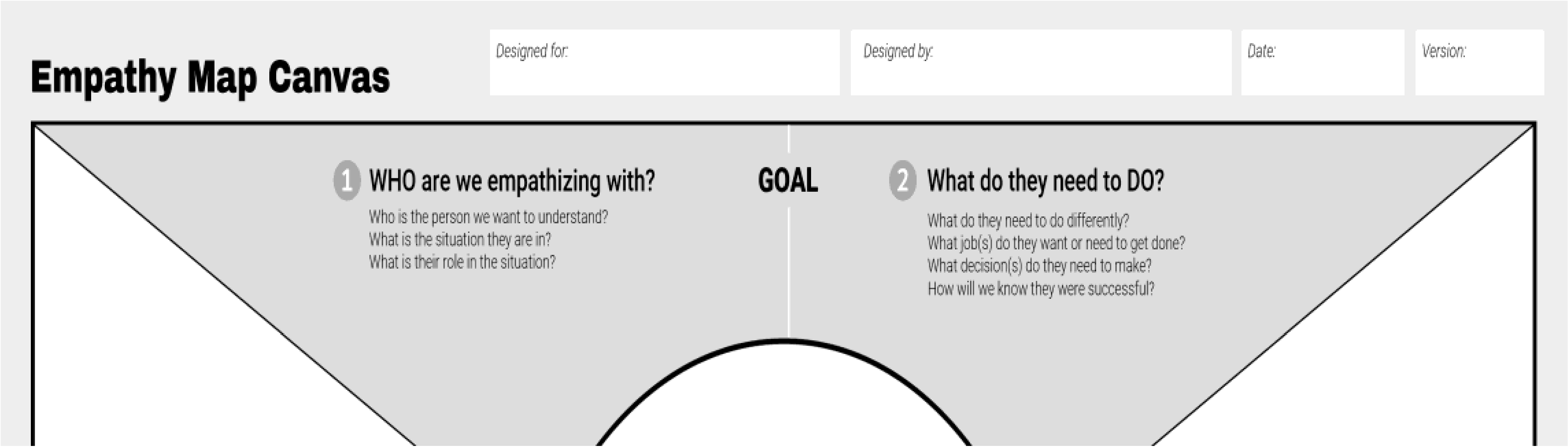
Benefits of Empathy Mapping

- Helps unearth insights about customers
- Encourages a customer-centric outlook and focus
- Creates an easy-to-digest visual
- Easily adaptable
- Reveals the underlying “why” behind customer’s actions and choices
- Helps internalize customer experience
- Helps improve the customer experience
- Digs deeper into a single journey touchpoint and/or a particular type of customer’s experience

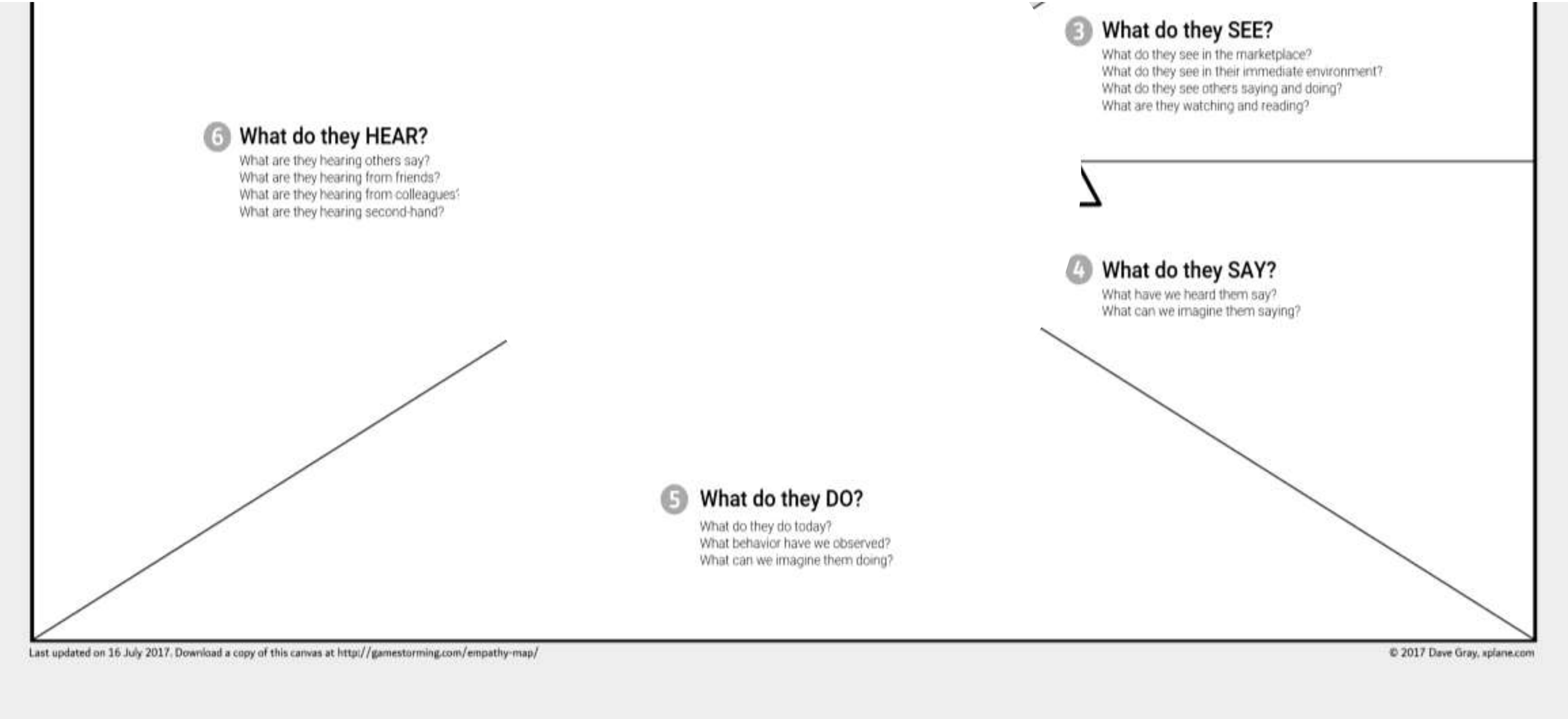
Dave Gray's Empathy Map Template



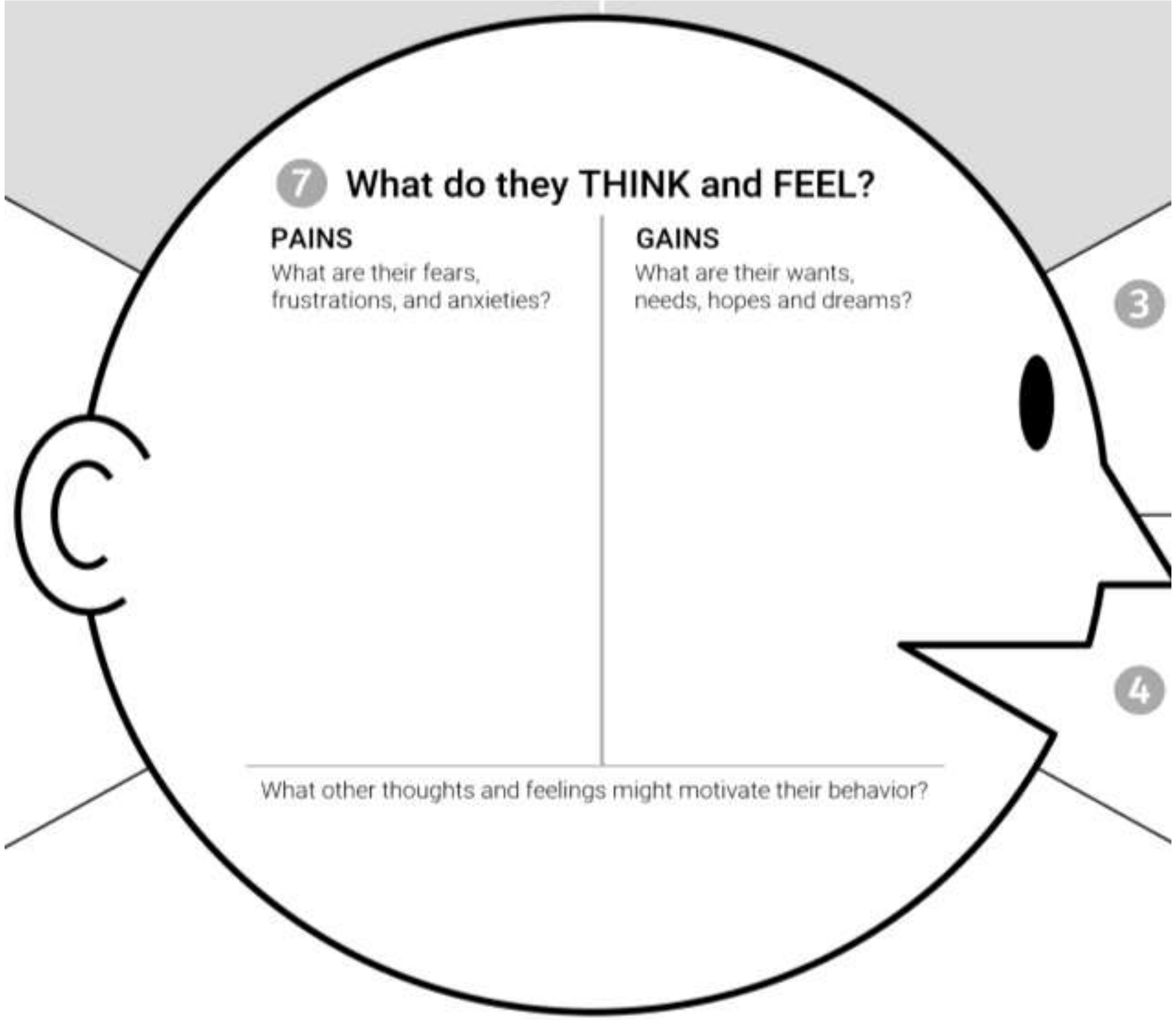
Goal


Empathy Map Canvas
Designed for:
Designed by:
Date:
Version:
1 WHO are we empathizing with?
Who is the person we want to understand?
What is the situation they are in?
What is their role in the situation?
GOAL
2 What do they need to DO?
What do they need to do differently?
What job(s) do they want or need to get done?
What decision(s) do they need to make?
How will we know they were successful?

See – Say – Do - Hear



Pains and Gains



Nudge Your Neighbor

What is one way that you think empathy mapping might be helpful to you?

Before Beginning

Gather Information

Customer Personas

- Marketing may have some created already
- Should be based on solid customer research
- Usually an aggregate of users with some common quality

Customer Interviews

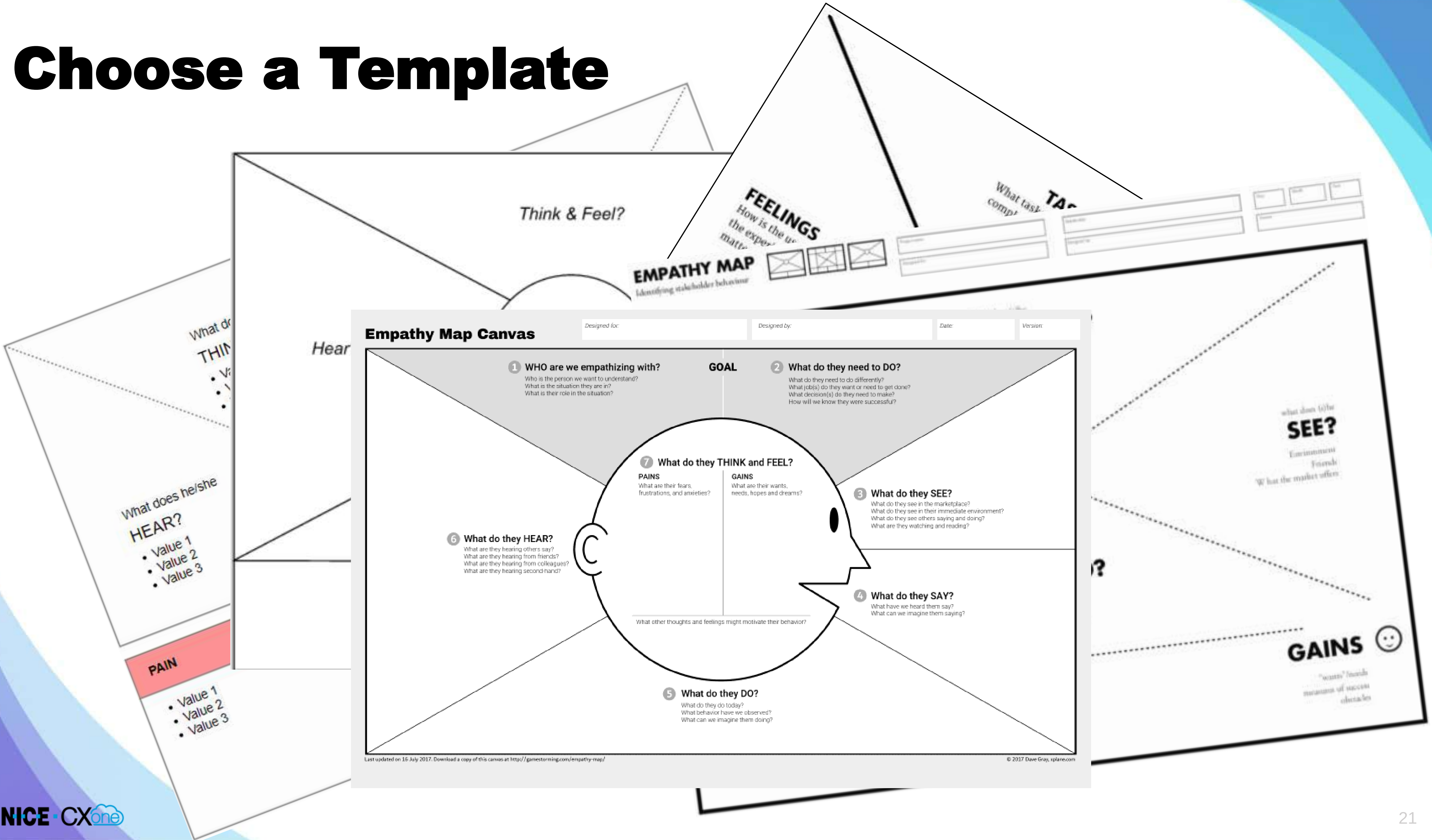
- Conducted in-person or via video or phone
- Conducted one-on-one
- Ask open-ended questions
- Do not interrupt
- Ask them to elaborate on their answers as needed

Define Your Purpose

Some sample purposes:

- To increase the team's sensitivity to the customer viewpoint
- To redesign processes/products to resolve a common customer pain point
- To flesh out a journey map touchpoint to get more insight into the customer experience
- To discover weaknesses in our customer research
- To uncover customer needs we are not already aware of
- To guide us to some meaningful innovation
- To understand what drives customers' behavior

Choose a Template



Invite Participants

Nudge Your Neighbor

What is one source of information that might be helpful when you are preparing to create an empathy map?

Creating the Map

The Process

- Gather everyone in the same room
- Share the purpose for the map
- Decide on the type of customer you'd like to map
- Create a list of questions to consider
- Add answers to the different sections, using post-it notes
- Consider each section of the map – think, feel, do, see, hear, etc.
- Identify areas where more research might be needed
- Wrap up, summarize, and identify insights

Tips

- Don’t empathize with just your ideal customer.
- Encourage cross-functional team participation.
- Don’t get slowed down on what goes where.
- Only explore what pertains to the customer’s perception related to the purpose of the map.
- Change or streamline the sections to suit your situation and needs.
- Follow the rule, “one persona per map.”
- Flesh out the persona before beginning.
- Encourage participants to talk about their thoughts.

What to Do with Your Map

- Plan a new strategy
- Gut check for canned responses
- Train new team members
- Save as a physical reminder of your customer’s viewpoint
- Ask yourself “why” for strange or surprising behavior to create new insights
- Take action on your insights

Nudge Your Neighbor

What is a customer situation that you think would benefit from empathy mapping?

Scenarios

A

A couple who live in the city center decide they want to try camping this weekend.

B

A middle-aged man is riding a motorcycle for the first time.

C

A teenager on his 15th birthday is trying to get his driver's license.

D

A woman is taking her first international business trip.

E

A man just had his first car accident.

F

A young mother just lost your wallet at the mall.

Creating An Empathy Map

- For the person in your assigned scenario, create an empathy map of what they are experiencing at the moment described.
- If you need to flesh out the person in your scenario, feel free to make up additional details.
- Your goal is to create a complete picture of what the person is personally going through in their particular situation.

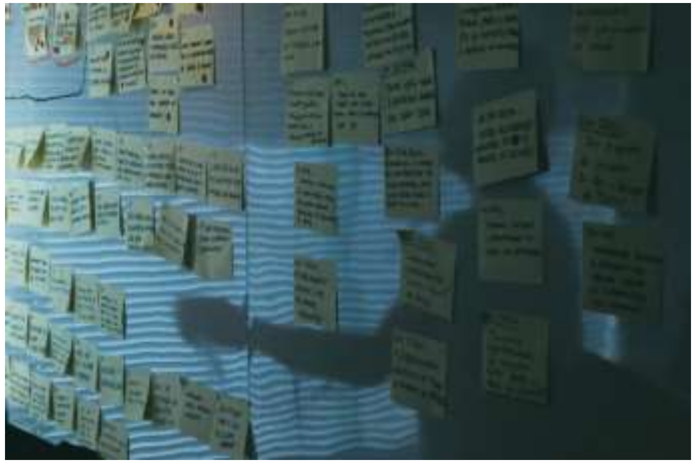
Close

Review

What is Empathy Mapping?

Before Beginning

The Process for Creating



What Are You Going to Empathy Map?

- Think of three situations that would benefit from your creating an empathy map.
- For each situation, identify the customer segment/persona, and the purpose of the map.
- For each situation, identify who would be helpful to you when creating the map.
- Are you going to follow through and actually create your empathy map for at least one of the situations you identified?

Empathy Mapping

A training workshop

https://www.niceincontact.com/

Developed by Elaine Carr and Laura Grimes
of Harrington Consulting Group
(https://www.harringtonconsulting.us/)

Speaker Notes – Slide 6

PREPARATION: If **presenting in person**, prepare two flipcharts as above and put them and markers in different places in the room.
If **presenting virtually**, use two chat pods, a whiteboard divided into two parts, two open-ended poll questions, or just have everyone answer the questions in the chat.

As people arrive, welcome them and encourage them to find a place. Once they are settled, they should answer the questions.

Keep this slide displayed until you are ready to start the class – which will probably be a few minutes after the start time. This pre-activity not only engages people from the moment they arrive, signaling that this will be a workshop requiring their active involvement, but it also gets people comfortable interacting in the room (virtual or in-person) and with each other. Be sure to circulate and introduce yourself to people. Virtually, you should comment (without judgment) on the responses people are posting.

If presenting virtually, you might also ask people to introduce themselves in the class chat.

Speaker Notes – Slide 10

Let’s begin with a reminder of what empathy is. Brené Brown, a renowned scholar, tells us that empathy is the ability to understand another perspective so well that you are “feeling with people” rather than simply feeling for them.

A lot of time, when we are interacting quickly with one customer after another, we often make assumptions about what they are thinking and feeling. These assumptions are based on our own past experience, which makes them flawed. We can’t verify that we’ve accurately identified the customer’s feelings. This causes breakdowns and miscommunications.

Speaker Notes – Slide 11

Empathy maps were first developed by Dave Gray, a product strategy leader and author of Gamestorming: A Playbook for Innovators, Rulebreakers and Changemakers. It's also gotten some attention due to Alex Osterwalder's book, Business Model Generation.

Dave Gray describes empathy maps as tools that "help teams develop deep, shared understanding and empathy for other people."

They are helpful for guiding teams into a customer-centric mindset.

Empathy mapping is NOT the same thing as journey-mapping. Journey maps recreates the entire customer journey while empathy mapping tends to focus on just one moment on that journey. Empathy maps can be helpful in exploring a particular touchpoint on the journey map in more depth.

Speaker Notes – Slide 12

Here are some benefits of empathy mapping. Just how helpful empathy mapping turns out to be will depend on how thoroughly you prepare and create your map and then what you do with the insights gathered.

Speaker Notes – Slide 13

This is from *Gamestorming*. And serves as a template for an empathy map. (You can download this template at http://gamestorming.com/empathy-map.) If, however, you Google empathy maps, you will find plenty of templates that might be slightly different from each other.

This empathy map is divided into multiple sections. [Next slide]

Speaker Notes – Slide 14

The top sections pertain to who the customer is and their Goal at a specific point.

Speaker Notes – Slide 15

We then have four sections spread around the rest of the center to define what the customer sees, what they say, what they do, and what they hear.

Speaker Notes – Slide 16

Finally, in the center of this empathy map, is a section for what they customers think and feel as expressed through pains and gains. Many templates put these columns at the bottom of the map so that they can put a picture or some kind of graphic representing the customer in the center of the map.

The workbook as lists of questions to consider for each section of the map.

Speaker Notes – Slide 17

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

For virtual trainings, you can assign them a partner and have them do a private chat to that person or just have everyone put their responses in chat.

Speaker Notes – Slide 19

Empathy maps work best if they’re drawn from real data, so some preparations need to be made before beginning to create the map. Gather information from customer interviews and surveys to help augment what you think and assume about your customers. Having customers involved in creating the empathy map is even better. In a pinch, however, maps can be built on your existing knowledge and stakeholder feedback.

A customer is a great start. The marketing department may have already developed several customer personas that might be helpful. These are definitions of different customer types and contain information as age, occupation, marital status, children, education, interests, ambitions, ethnicity, and how they interact with your company. Most companies have to create multiple personas to represent in general their entire customer population – or at least the major segments.

Personas can capture one particular user or be an aggregate of multiple users. Most often they are aggregates of users with some common characteristic – age, the way they interact with your brand, social media usage, type of domicile, region, or other helpful quality. Using a persona that is based on solid customer research as the basis of the empathy map helps make the map more realistic and alive to real customer situations.

Another source of helpful customer information is customer interviews. Actually talking to customers one-on-one and asking them open-ended questions about their experience (as opposed to choosing from a set of options in a survey question) will garner the best results. Listen, take notes, nod, and ask for further elaboration. These kinds of interviews generally only last 30-45 minutes.

Speaker Notes – Slide 20

What is the purpose of your empathy mapping session? Some sample purposes might include:

- To increase the team's sensitivity to the customer viewpoint
- To redesign processes/products to resolve a common customer pain point
- To flesh out a journey map touchpoint to get more insight into the customer experience
- To discover weaknesses in our customer research
- To uncover customer needs we are not already aware of
- To guide us to some meaningful innovation
- To understand what drives customers' behavior

ASK, what other purposes might you have in journey mapping?

Speaker Notes – Slide 21

AUTOMATIC ANIMATED – a different template will appear every 5 seconds.
Choose a template that will suit your purpose. Look at lots of options by Googling empathy maps. If the map will be a team effort, you might want to draw it on a large whiteboard or some flip chart pages. And have a bunch of post-it notes available. Using post-its to add responses to the map allows you to later rearrange and group responses.

Speaker Notes – Slide 22

The participants should be people who can contribute to your purpose. Stakeholders, representatives from different departments, customers, vendors, a customer service team, or whomever is important to your purpose. You do need to carefully consider who you invite as large numbers of people will make it harder for everyone to participate. And you want them to have knowledge of the customer that they can contribute to the map.

Speaker Notes – Slide 23

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

For virtual trainings, you can assign them a partner and have them do a private chat to that person or just have everyone put their responses in chat.

Speaker Notes – Slide 25

- **Gather everyone in the same room.** Or on a video platform with a collaboration function – but in person is best.
- **Share the purpose for the map** so that everyone is on the same map.
- **Decide on the type of customer you'd like to map**. You may have already determined the persona you will use and just have to share that information with the group. Or you might want the group's insight on the customer segment most impacted by the problem you are trying to explore.
- **Create a list of questions to consider.** These are questions like the ones in your workbook for each sector of the template. Or you might have a professional moderator who prompts with questions such as What environment are your customers in when they are using your service/product? Are they having fun or do they want to get it over with? What's their life like outside of using your service/product? What kind of day are they having? And other questions that might spark the group in their mapping.
- **Add answers to the different sections, using post-it notes.** It is better to use post-it notes as you can move them around and group them as appropriate when you are looking over the entire map. You can have each participant place their post-it note on the template one at a time and very briefly explain their thoughts.
- **Consider each section of the map – think, feel, do, see, hear, etc.** You can systematically go through the sections and/or jump around as appropriate.
- **Identify areas where more research might be needed**. Where your map is sparse indicates where more research about the customer might be necessary to fill out a fuller picture.
- **Wrap up, summarize, and identify insights.** Watch out for making assumptions but rather try to confirm what customers actually feel about the situation. Did anyone have a change of opinion about the situation? What insights did participants have about the situation and or the customer segment? Are there any data based on assumptions rather than data? Are there insights that need further support or research?

If you come to a standstill even though you think the group still has more to contribute, try some role-playing with one person playing the customer and another asking questions about the product/service and life circumstances, etc.

Speaker Notes – Slide 26

- **Don’t empathize with just your ideal customer.** Your ideal customer probably doesn’t really exist and they probably don’t capture the full depth of your customer base. We want to design experiences, products, and services with a broader, deeper understanding than just our ideal customer.
- **Encourage cross-functional team participation.** The different perspectives on how we interact with customers can be very valuable and unearth new insights.
- **Don’t get slowed down on what goes where.** Getting things on the board is more important than getting them in the right section. Remember that we aren’t trying to correctly classify information but rather to identify with the customer.
- **Only explore what pertains to the customer’s perception related to the purpose of the map.** Empathy mapping is not about logging every emotional and behavior aspect of the customer. It’s about focusing on your targeted segment and understanding their world as it relates to your company.
- **Change or streamline the sections to suit your situation and needs.** Choose a template that fits your purpose rather than having to fit into a certain template.
- **Follow the rule, “one persona per map.”** If you are going to explore multiple personas, make a different map for each of them.
- **Flesh out the persona before beginning.** Who is this customer that you are going to be identifying with? It doesn’t have to be complete detail, but enough detail for everyone to understand who they are and to develop responses for each section.
- **Encourage participants to talk about their thoughts.** Ask questions to get to more profound insights and make sure that everyone provides their unique perspectives.

Speaker Notes – Slide 27

- **Plan a new strategy.** Use the empathy map as a decision lens for viewing new initiatives through the customer’s eyes.
- **Gut check for canned responses.** Use the map to determine if your canned responses are appropriate for every customer.
- **Train new team members** with a customer-centric mindset.
- **Save as a physical reminder of your customer’s viewpoint.** Some have turned their map into a poster that they hang in the conference room or other central place to remind staff to keep a customer-centric view on the business.
- **Ask yourself “why” for strange or surprising behavior to create new insights.**
- **Take action on your insights.**

Speaker Notes – Slide 28

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

For virtual trainings, you can assign them a partner and have them do a private chat to that person or just have everyone put their responses in chat.

Speaker Notes – Slide 29

Divide the participants into groups of 3-5 people and assign each one of the above scenarios. These are nice generic scenarios that most people could relate to. These type of scenarios are good for practice.

Alternatively, you can create scenarios that are pertinent to your organization. Try to make them more extreme scenarios as those are easier to map.

Speaker Notes – Slide 30

Here are the instructions for the small groups creating the map. These instructions also appear in the workbook.

If presenting virtually, have the breakout groups create their empathy map on a whiteboard that can then be shared with the rest of the participants.

If presenting in person, provide each group with a flip chart and some post-it notes for creating their empathy maps.

Allow 20-30 minutes for groups to work and then another few minutes for a gallery walk* of the maps (if in person) or for you to share each group's map briefly. *A gallery walk is when participants get up and walk around to examine each map.

Debrief: Ask for any insights they had about empathy mapping (as opposed to about the customer) in doing the small group work.

Speaker Notes – Slide 32

As each area of this workshop appears on the screen, call out something you remember from that section. [CLICK] to pull up each section and allow up to 1 minute for people to call out. Keep this moving pretty quickly.

If presenting virtually, participants can unmute and speak their remembrances or type in chat or use this slide as a whiteboard.

Speaker Notes – Slide 33

Give people up to 5 minutes to create their action plan.

Deliver any final comments and thank people for participating.