

# Context First: The Next Wave of Customer Experience Design

Why a Mobile First Strategy is No Longer Enough





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## Mobile First Strategy Is No Longer Enough

The ubiquity of smartphones has led many companies to adopt a Mobile First strategy. With customers increasingly likely to engage with an organization through a mobile device, businesses must design every experience for smaller form factors first. In other words, starting with the experience for smartphones and tablets and then deriving the native website experience by creating larger, enhanced versions of the mobile experience. This design strategy helps experience designers break free of the “design by removal” trap, where they find themselves having to design a mobile app by removing functions originally designed for a 12”-14” computer screen.

We have seen numerous Fortune 500 corporations, including United Airlines<sup>1</sup>, Starwood Hotels, and Starbucks, recognize the challenge and transition to Mobile First design.

We believe that a Mobile First strategy is no longer enough. John Devanney, Managing Director at Moment, a digital strategy and design consultancy, points out that Mobile First served its purpose in creating focus. “Web experiences had become really bloated and unfocused. The value of Mobile First has been to help companies simplify, clarify and focus.” But he points out that the landscape has

shifted since. “Leading companies don’t think of themselves as Mobile First anymore, but it was a strategy for them once upon a time.”

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## The Emerging Inadequacy of Mobile First

The main issue with Mobile First is that it is primarily a design strategy, not a holistic approach to customer experience. Also, today’s customers interact with a brand through myriad touchpoints and in a variety of contexts. Only focusing on mobile as the end goal therefore only solves a relatively limited scope of a customer needs and wants. The customer journey is now much more complex and much more synchronized with daily life. Given the complexity of today’s customer journey, Mobile First design is too limited in its ability to account for the nuances of the customer context. Companies that follow a pure Mobile First strategy are missing emerging and innovative opportunities for customer engagement.

## Where Mobile First Went Astray

The Mobile First movement started with two premises at its core. First, that mobile is now the operating system of our lives. Second, that because consumers are increasingly starting their customer journey on a mobile device, companies need to design for mobile as the primary touchpoint. The first point was undeniable and still is. But we believe that for three reasons, the second premise over-simplifies the impact of mobile:

### 1. Mobile is Not a Single Channel

While a smartphone might appear at first sight to be a channel, it is in fact multiple channels with multiple interfaces to multiple touchpoints:

- a telephone that may connect a customer to a call center
- a manual interface to a web browser used to visit a native website
- the host for a native mobile application.

It is also important to recognize that text messages are poised to become a transaction medium. In summary, calling “mobile” a channel and including it in a customer journey map as a single touchpoint underestimates how a mobile device might be used.

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## 2. Mobile is a Powerful Identifier of Customer Context

A customer using a smart device such as a smartphone or phablet is potentially providing a unique identifier. They are also likely providing geolocation information, which can allow experience designers to understand what is in proximity to the customer and how that might influence their needs. We can also know time of day and, with integration of 3rd party data, you might even know the weather. Finally, if they have registered, we may also know something about their historical needs and also how they have interacted with a brand across touchpoints. Over time, this wealth of data should allow us to begin to anticipate a customer's needs and respond appropriately, based on context.

## 3. A Mobile Customer May Be Better Served by a Response Outside the Device

Mobile First assumes that because mobile usage is so prevalent, that we need to be thinking about responding in the form of the device in the consumer's hand.

But if we broaden our view to consider the customer's context, there might be a better way to respond to that customer. For example, perhaps a salesperson's tablet, a digital kiosk, or even a nearby digital sign might be more effective.

## The Possibility of Context First

A Context First approach is capable of doing what Mobile First cannot do because it focuses first on understanding *why* a customer is engaging and the specific context of the customer's needs or wants, not only the medium through which the customer engages.

By applying this broader, device-agnostic lens of customer context, experience designers can deliver a customer experience that is highly personalized and more responsive to each phase in a customer's decision journey.

The potential upside of that approach is clear from a recent poll conducted by Rosetta<sup>2</sup>: engaged customers buy 90% more frequently and spend 60% more per transaction.

## What is Context First?

Context First strategy focuses on understanding *why* customers are engaging with companies to begin with. According to JP Stallard, co-founder of Solv, a digital experience innovation firm in San Francisco, Context First is an exercise in “asking the right questions and understanding the true purpose of a product or service.”

As opposed to Mobile First, Context First seeks to understand the complete environment surrounding the customer and leverages mobile devices as tools of determining context, not the sole element of context. What's more contextually relevant is *who* is using it, exactly *where* they are using it (e.g. location, indoor or outdoors, in-store or browsing online), and *what their relationship* is to the brand, product or service in question. To summarize, driven by mobile, brands can now get deeper into your daily life.

Context First focuses attention on delivering a customer experience which is both highly personalized and responsive to each phase in the customer's decision journey. By taking the time to observe customers in many contexts, companies can develop customer personas based on a blend of quantitative and qualitative attributes, focusing on what each persona needs, wants, and cares about, and what their objectives are most likely to be across various contexts. Using a small number of refined personas as design targets, companies can begin to offer each customer a tailored experience in a range of contexts.

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### Context First leaders

Consider EpicMix Ski, a mobile application that was developed by Vail Mountain Resort. EpicMix Ski is designed to segment users and adapt its behavior based on learnings from the wide variety of visitors that flock to Vail each year. With EpicMix Ski, thrill-seeking extreme skiers will receive different information and prompts than, say, those who are more interested in the resort's nightlife. This smart adaptation delivers a differentiated experience that is more valuable to both customer segments, and does so by understanding the likely intent of the

customer based on their persona and the context they are in, e.g., on the way towards mountain in the morning or on the resort's premises in the evening.

According to Moment's Devanney, understanding the customer's mindset is key. In particular, “the customer's psychological makeup at the point in the experience you are designing.” Additionally, it is critical to ask the question: what is the customer doing before and after engaging with the brand? To illustrate, women's clothing retailer Rebecca Minkoff incorporates digital dressing rooms. These allow you to adjust the room's lighting to match the environment where you are likely to wear the clothing. The digital dressing rooms are designed with the understanding that customers are interested in knowing what a dress will look like in mood lighting at a restaurant, or how a coat will look in the sunlight, rather than in a fluorescently lit dressing room.

Uber is another company making considerable strides into Context

First. Uber's ability to detect the user's location and tie it with regional regulations ensure both drivers and passengers enjoy trouble-free pickups<sup>(a)</sup>.

Imagine if Uber was not context aware and allowed passengers to request rides at locations where its service, UberX, is not legally allowed - for example at certain airports - resulting in traffic tickets for the driver and major inconveniences and delays for the passenger.

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***Personalized purchase recommendations based on previous consumer interactions can increase conversion rates by as much as 20%***”

<sup>(a)</sup> Uber's recent decision to use Foursquare's location database suggests that Uber is attempting to learn even more about customer context.



Rebecca Minkoff Digital Changing Rooms



Uber Pickup Station at Airport

## How Context First Delivers Business Results

A Context First approach is designed to deliver significant business results. For instance, 61% of smartphone users say they are more likely to buy from an app or mobile website that customizes information to their location.<sup>3</sup> Personalized purchase recommendations based on previous consumer interactions can increase conversion rates by as much as 20%.<sup>4</sup> For Uber, this means predicting when customers will need a ride before they request it. EpicMix Ski may facilitate bookings based on their market segmentations. Context First is all about finding the best ways to serve customers in their world.

## Defining Your Customers' Context

What customer attributes do companies need to pay attention to in order to create this highly personalized customer experience? As user experience designers, our goal is to help the customer achieve their intended objective in a way that delights them in their current context. This may mean eliminating steps to speed the process. Or, conversely, adding in a step that enables them to easily broadcast to their social circle. It all depends on their objective.

We have identified three key dimensions, termed 'context drivers,' that a designer should consider in developing an experience that aligns with the Context First approach. Collectively, these three drivers account for the 'who, what, why, where and when' of the customer experience.

### 1. Customer Persona

Experience designers know that solid personas are a combination of quantitative demographics and qualitative insights. Personas need to account for the needs, wants and desires that drive quantifiable past behavior, observable preferences, brand loyalty and the projected lifetime value of that particular customer. Most importantly, personas may span multiple traditional quantitatively-driven customer segments, as personas are customers with shared objectives and mindsets, despite a potential delta in traditional demographics.<sup>5</sup>

### 2. Customer Objective

At any given point, a customer is in one specific phase of their purchase journey across 'Discover, Buy, and Service'. For instance, they may be in the "Discover" phase, where they are seeking product or service information.

They may be in the “Buy” phase, where they are seeking to transact. Or perhaps in the “Service” phase, where they are looking for post-purchase support. Identifying the right phase, and providing the right type of attention for that phase, matters. The importance of this point is underpinned by research that shows that 70% of Americans are willing to spend an average of 13% more with companies who provide above-average customer service.<sup>6</sup>

The customer’s objective is necessarily influenced by their past experiences with the brand. We must use everything we know about both the customer on two levels. One, as an individual (what led them to engage, their past and current activity across our channels). Two, their persona (to infer their objective and the phase of the journey they are in). Based

on their objective, we should be looking to design an experience that quickly adapts to that goal.<sup>7</sup>

### 3. Customer Environment

Effective adaptation to the customer’s objective will be heavily influenced by their immediate environment. This environment encompasses both the ‘where’ and ‘when’ of a situation and may be derived from the local time, place, proximity to other relevant locations, and even the current weather.

Several examples illustrate the power of these three drivers. Fashion apparel brand Rebecca Minkoff understands a shopper preparing for a date (Driver 1: Customer Persona) and that they want to know what a dress will look like in restaurant mood lighting (Driver 2: Customer Objective) rather than within a brightly lit dressing room

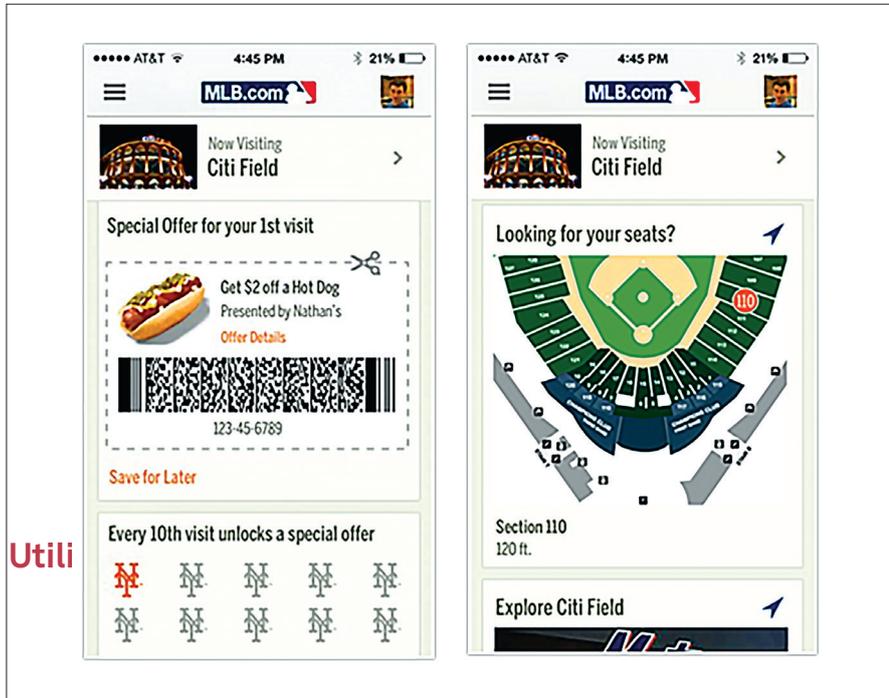
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(Driver 3: Customer Environment). Within hospitality, Disney’s Magic Band is able to incorporate known visitor profiles (Driver 1: Customer Persona) and real time park flow and capacity (Driver 3: Customer Environment) to plan and adjust itineraries to reduce wait time (Driver 2: Customer Objective) and optimize the overall experience for the visitor and their family.

Disney’s Magic Band





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MLB Ballpark Mobile App

Major League Baseball has encompassed known fan information (Driver 1: Customer Persona) to deliver specialized promotions from vendor coupons to upgraded seats on game day (Driver 2: Customer Objective). Their mobile app also has the capability to deliver supplemental content and directions based upon the fan's location within the stadium (Driver 3: Customer Environment).

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*Not only do advocates act as influencers, but data shows that they also tend to spend 15% more than non-advocates*  
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What, for example, might the MLB app become if they took full advantage of all three Context First drivers: Customer Persona, Customer Objective, and Customer Environment?

**Customer Information**

**Potential Services to Offer**

**Die hard fan** (Driver 1: Persona)  
**Want to know latest stats** (Driver 2: Objectives)  
**At stadium watching game** (Driver 3: Environment)

**01 Offer premium content for At Bat app on mobile device**

**Recently shopped for team gear**  
 (Driver 2: Objectives)  
**At stadium watching game**  
 (Driver 3: Environment)

**02 Recommend items from the team store using fan's browsing history**

**Follows every play, doesn't leave seat**  
 (Driver 2: Objectives)  
**At stadium watching game**  
 (Driver 3: Environment)

**03 Offer mobile food ordering and delivery to seat**  
*Customer orders food and pays using credit card on file*

**Follows every play, doesn't leave seat**  
 (Driver 2: Objectives)  
**At stadium watching game**  
**Bases loaded, two outs** (Driver 3: Environment)

**04 Delivery of food during non-critical game situations (between batters)**

## What's next?

These brands are on the right track, but there is still significant potential to transform the customer experience and drive top line growth. For example, if a brand were able to fully address all context drivers and take the customer experience to the next level, they can create more brand advocates. Not only do advocates act as influencers, but data shows that they also tend to spend 15% more than non-advocates.<sup>8</sup> What if MLB extended their use of customer personas and offered VIP food service to die-hard fans who refuse to leave their seat during a game? For this case, the optimal upcharge could be calculated by aggregating

the historic willingness to pay for fans within the target segment. What if Rebecca Minkoff sent a calendar reminder to a busy customer about an imminent weekend wedding and included both a dress recommendation based on purchase history and an offer for free overnight shipping?

The data to enable Context First is already being captured and the opportunities for companies to drive value are endless. Since Context First is still in early stages of adoption and utilization, early mastery of Context First can ensure companies leapfrog competitors and position themselves in that rare and difficult to attain category: the truly customer-centric brand.

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<sup>1</sup> United Airlines is a wholly owned subsidiary of the Fortune 500 company United Continental Holdings

<sup>2</sup> 2014 Rosetta Consulting Customer Engagement Study

<sup>3</sup> Consumers in the Micro-Moment, Wave 3, Google/Ipsos, U.S., August 2015, n=1291 online smartphone users 18+

<sup>4</sup> Capgemini Consulting Report: Click2Stores: How Can You Drive In-Store Traffic Through Digital Services?

<sup>5</sup> There is a temptation to say we can design experiences for an individual customer, but the truth is that experience design always has boundaries. We aggregate common, important customer needs in personas and respond in our design. Done well, the experience feels completely customized to our most valuable customers.

<sup>6</sup> 2014 Global Customer Service Barometer, American Express

<sup>7</sup> We might also observe enough aggregated objectives to change overall functionality. When Rue La La recently realized that 40% of its revenue was coming from mobile and that the largest growing segment were Android users, they added Google Wallet Instant Buy to their app to create a 2-click checkout experience. they increased conversion 4x over non-Android users.

<sup>8</sup> Readwrite.com. Top 5 ROI Benefits of Customer Experience Management

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