Infosys cobalt

# SALESFORCE AND DESIGN THINKING: EMPOWERING THE NEXT GENERATION CUSTOMER EXPERIENCE

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## Setting the stage for the future

The future belongs to digital companies. That's why they'll invest 50% of their IT budgets in direct digital transformation by 2024[1]. They will also accelerate their digital transformation journey by adopting innovative new ways to develop software. As part of this journey, product selection is heavily influenced by factors such as time to market, increased adoption index and overall program cost for transformation engagements. In this context, cloud has emerged as the winner considering external situational factors. According to Gartner, public cloud end-user spending will continue to exhibit healthy growth rates[2] . That's why more product companies are moving to platforms and building with low code or no code tools.

Consider the case of CRM, a crucial piece in the enterprise landscape. Unfortunately, almost until a decade ago, many CRM implementations did not yield the desired outcome owing to adoption issues. The issue was compounded by a siloed approach to implementation from the enterprise and vendor IT teams. However, today the scene is very different.

Organizations are all about centering agility and user centricity at their core. What are the implications? Put simply, **an agile** organization can **sense and respond quickly, frequently** and almost **instinctively** to disruptions in the complex digitally enabled business environment. In a way, it is comparable to living organisms adapting to everyday changes but at an enterprise scale. In the business world.

Infosys defines a **Live Enterprise** as an organization always being ready for what's next because it is continuously learning and evolving[3]. Design Thinking plays a crucial role in enabling **Live Enterprises**. How? **This innovative problem-solving methodology** focuses on enabling collaboration between users, designers, developers, implementation partners, and domain experts to unlock the power of discovery to bring ideas to life based on how real users think, feel and behave.

Salesforce leads the CRM arena in providing a suite of products delivering value to the customer experience (CX). This article explores how **Design Thinking and other supporting design methodologies can complement Salesforce capabilities** to deliver enhanced CX and accelerate digital transformation.

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[1] Digital transformation in 2022 and beyond: These are the key trends | ZDNET
[2] Gartner: 'Cloud Migration Is Not Stopping' In 2023; $592B Predicted In Public Cloud Spending | CRN
[3] Infosys - The Live Enterprise Book

## Design Thinking leads the way

Design Thinking and digital transformation are closely interlinked – Design Thinking acts as a guiding principle for a successful digital transformation when done right.

Design Thinking is crafted to eliminate biases that obstruct innovation. Experts in this field inspire and enable teams to think out-of-the-box with the user at the epicenter. For example, traditional workshops for requirements gathering do not meet today's needs as they concentrate only on the stated needs. In contrast, Design Thinking workshops can coax out the unstated. The renowned business thought leader, the late C K Prahalad, aptly said, "How we ask the question is extremely important to how we find the answer[4]."

While every solution has an implicit expiry date, Design Thinking lays the right foundation for a solution framework to be orchestrated in such a way that it can be iterated and augmented continuously. Furthermore, it ensures that the renewal plan emerges from within that framework.

In addition, Design Thinking can take care of the nuances too. For example, touchless swipe card adoption in India did not flourish as fast as anticipated. What were the reasons behind such poor adoption? Has adoption improved with techniques such as the promotion of RFID protected wallets or allowing the touchless feature to be enabled for a small window of time i.e. when one is shopping or frequently making payments? These are the questions that Design Thinking addresses and enables a highly user-centric solution.

## Design Thinking drives several business outcomes when incorporated during the initial stages of a program, including:

1. **Empathetic designs** that are **grounded in user-centricity**, resulting in easier navigation, increased user adoption, smoother change management and overall improved customer experience

2. **Faster time to market, increased productivity, harmonization and process simplification**

3. **Stronger foundations for easy problem solving** and **improved discovery and ideation**

4. **Modern systemic interface designs** requiring minimal customization and enabling increased scalability.

### Design Thinking – the secret sauce

What lies behind Design Thinking that yields such high impact outcomes? Five stages make up the Design Thinking process[5].

1. **Empathize:** At the heart of design thinking is the necessity to empathize and understand the needs and problems of users. Therefore, the designer meticulously captures the everyday pain points of the end user, the circumstances that give rise to these pain points and the time when they prevail. However, the designer is careful to consider the same use case may uncover different needs and problems across different time periods and moments of user interaction.

2. **Define:** The problems are clearly organized using mind maps or frameworks into logically viable inputs. These details require abstract and lateral thinking that can be enabled during Design Thinking workshops.

3. **Ideate:** Here, the team develops ideas for a new product and a prototype employing inventive and innovative ways. Asking questions is the secret ingredient to making this a success, as it will encourage creative and out-of-the-box thinking. As a result, it will provide an opportunity to explore several solution options and narrow down to the most viable choice for end users.

4. **Prototype:** Once a solution is developed to address the problem, it is time to create a prototype. Prototypes can be either conceptual (low fidelity) or semi-working (higher fidelity) prototypes. Designers use UI and rapid prototyping tools to make it easy to deliver a quick proof of concept.

5. **Test:** Finally, the goal is to evaluate the prototypes to determine what works and what doesn't. A combination of quantitative benchmarks and qualitative sessions with end users validates if the problems have been solved. This is followed by user feedback documentation that is used to inform further design iteration and development.

Infosys has a long and successful history with Design Thinking that includes tapping into academic thinking, acquisitions and internal capability building. Associations with Stanford University, Rhode Island School of Design, Cornell University, the University of North Carolina and Purdue University have shaped its digital transformation trajectory with Design Thinking playing a central role. In addition, acquisitions of companies Brilliant Basics, WongDoody and Kaleidoscope Innovation have enabled Infosys to engage with clients in a design-centric way to deliver more compelling solutions. Finally, Infosys has set up numerous Technology Hubs and Innovation Centers in key locations to continue its Design Thinking push. At Infosys, Design Thinking is now well and truly integrated into our daily work.

[4] You cannot lead unless you are future-oriented' - 35 quotes from business guru C.K. Prahalad (yourstory.com)

[5] What are the design thinking principles? | ifaai.org (true-agile.org)

## Salesforce harnesses Design Thinking principles to deliver excellent CX

As a product company, Salesforce is cognizant that making a difference to its users is paramount to the success of its offerings. And this goes well beyond the look and feel, technology or features – rather, it focuses on anticipating and meeting the needs of its users. The company believes that Design Thinking is crucial for innovation . Salesforce Industry clouds provide ways and means to 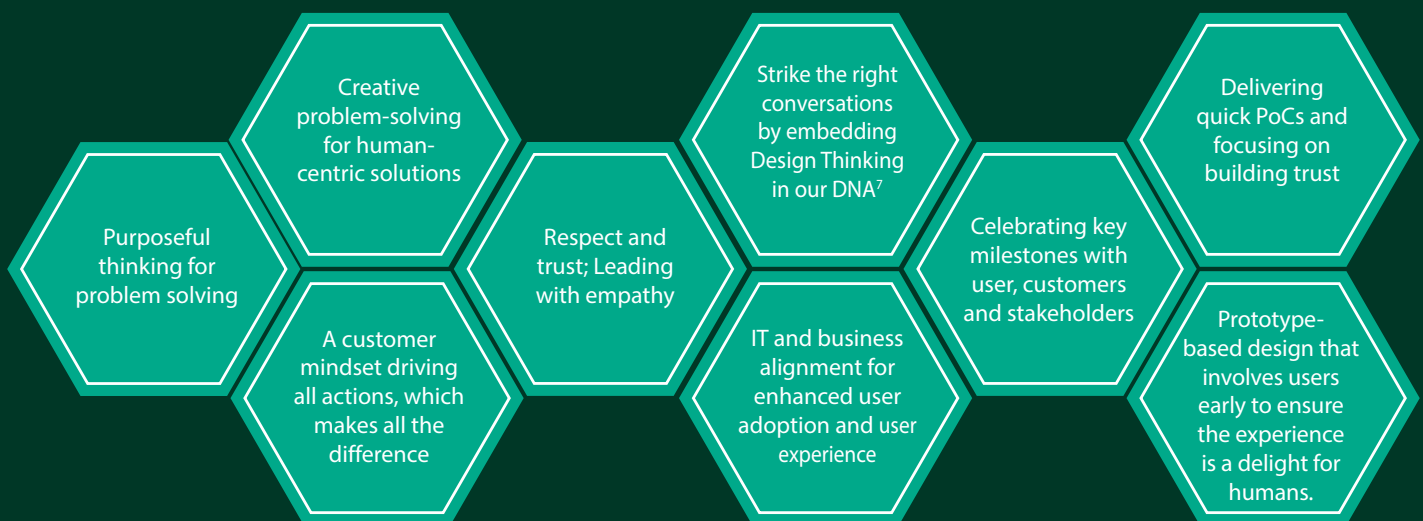help SI's explore the human context for every problem, elaborate the problem statement, and develop ideas and solutions iteratively to achieve the best customer experience (CX).

Salesforce products provide a quick drag and drop prototyping option that allows further prototype-based detailing of epics and user stories with ease. This leads to faster build cycles and shortened time to market via rapid iteration and incremental development cycles.

## Infosys enables next gen CX

> ❝ **"Excellence is not a skill. It is an attitude."**
> **Ralph Marston** ❞

The last few years have shown that next-generation CX requires heavy doses of perseverance and attitudinal focus. At Infosys, we have extended this to the way we deliver projects by relying on a few key cultural principles:

- Purposeful thinking for problem solving
- Creative problem-solving for human-centric solutions
- A customer mindset driving all actions, which makes all the difference
- Respect and trust; Leading with empathy
- Strike the right conversations by embedding Design Thinking in our DNA[7]
- IT and business alignment for enhanced user adoption and user experience
- Celebrating key milestones with user, customers and stakeholders
- Delivering quick PoCs and focusing on building trust
- Prototype-based design that involves users early to ensure the experience is a delight for humans.

[6] Ways Salesforce Uses Design Thinking to Create Solutions that Customers Love - Salesforce Blog
[7] Infosys Clients Use Design Thinking for Change & Innovation: Forrester

Our human-centered approach to Salesforce design, development and training ensures a deep understanding of the interactions between an enterprise and its end users to achieve the most desirable future state. In addition, we have a rich and extensive repository of knowledge assets (such as frameworks, methodologies, ways of working and best practices). For example, Infosys Cobalt is a set of services, solutions and platforms to accelerate the Enterprise cloud journey and Wingspan, our learning platform, further enables us to achieve the most desired and user-centric end state.

Infosys recommends a 3-sprint methodology, as shown in Figure 2, to design journeys and workflows and define business requirements during the Salesforce pre-implementation phase. This methodology encompasses three stages -

1.Discover phase which aims to understand the needs, pain points and expectations of users

2.Design phase where the end state is recast based on the user inputs

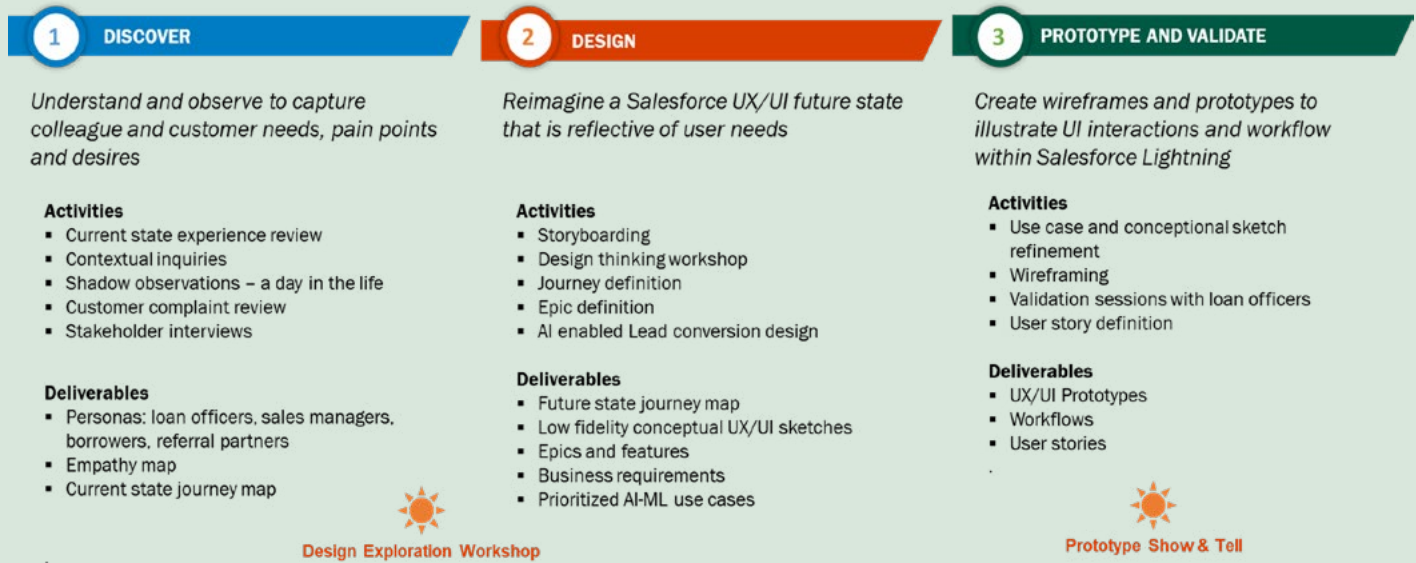3.Prototype and validate phase where wireframes and prototypes and developed to highlight the actual working product



Figure 2  A 3-sprint approach

The Infosys Salesforce practice has many tales of success where our practitioners have capitalized on these assets along with Design Thinking as an approach for successful value discovery workshops. The strategy for finalizing the best suited solution for their end customers revolves around testing various hypotheses using POCs. As a result, the shortlisted solution becomes highly adaptable as it has the users' needs at its core.

## Final thoughts

Customer experience remains firmly in the spotlight, and rightly so. The rapid changes in all aspects of the business environment have, in turn, triggered dramatic shifts in customer behavior and expectations. With more access to information and technology, savvy customers are demanding the same levels of experience with Enterpise products as they enjoy as every day consumers. Therefore, organizations are exploring hyper-personalized, intelligent and convenient engagements to satisfy their customers and gain greater loyalty. According to Gartner, customer experience drives over 66% of customer loyalty[ Top Insights for Marketing Leaders | Gartner]. Therefore, it's no surprise that enterprises are increasingly obsessed with customer experience.

Experts worldwide agree that it is imperative to incorporate a Design Thinking mindset to deliver the levels of customer experience required to compete. With its ability to draw out the customer's stated and unstated needs and better anticipate their wants, a Design-Thinking culture will go a long way to enhancing an Enterpise's capability to deliver great customer experience. Adressing customer problems by infusing empathy into the process is the key. A recent McKinsey report[ CX without design only gets you halfway | McKinsey] states that the coming together of CX and Design Thinking will hugely impact customer experience.

The evidence is now clear that this is the only way to ensure the survival of any customer-centric business. As a result, enterprises exploring CRM implementations must consider advanced tools like Salesforce, ranked #1 in CRM market share for nine consecutive years[10] , and judicious use of Design Thinking principles to help craft the very best customer experience.

[8] Top Insights for Marketing Leaders | Gartner
[9] CX without design only gets you halfway | McKinsey

## About the author

**Manish Govil**

Manish Govil, an IT leader with 25 years of experience across practice management and service delivery, is a Senior Industry Principal and Senior Delivery Director for Enterprise Cloud Application Services (Salesforce) Practice at Infosys. In addition, he has worked with several renowned IT service providers and system integrators. He has led the global CRM portfolio for over 15 years, utilizing Salesforce Industry Clouds. Additionally, he has donned multiple roles, such as Program Manager, Solution Architect and Advisory Board member across several Salesforce implementations. Manish is a customer-centric, value-driven leader who has contributed to strategizing and delivering technology enabled business transformation for many enterprises.

[10] Salesforce Ranked #1 in CRM Market Share for Ninth Consecutive Year - Salesforce News

**Infosys Cobalt** is a set of services, solutions and platforms for enterprises to accelerate their cloud journey. It offers over 35,000 cloud assets, over 300 industry cloud solution blueprints and a thriving community of cloud business and technology practitioners to drive increased business value. With Infosys Cobalt, regulatory and security compliance, along with technical and financial governance comes baked into every solution delivered.

For more information, contact askus@infosys.com

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