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Widely recognized expert on customer experience. Exceptional analytical and communications skills; able to quickly discern key issues in complex environments. Extensive experience helping large organizations improve their marketing and customer experience efforts.

Forrester Research, Cambridge, MA

1998-present

Vice President and Principal Analyst, Customer Experience

Research and consult on customer experience transformation. Previous roles include managing financial services and customer experience research and consulting practices.

- Consulting and advice:
 - Guided dozens of executives on their customer experience transformation programs; providing advice and coaching on topics like organizational design, voice of the customer programs, and building a customer-centric culture.
 - Developed and delivered training sessions for aligning organizations around their customer experience strategies.
 - Developed and applied methodologies for evaluating interactions within and across channels including Websites, kiosks, email, retail stores, and call centers.
 - Provided feedback on dozens of business plans for launching new initiatives.
 - Helped technology vendors refine their product plans and marketing strategies.
- High-impact insight:
 - Authored many of Forrester's high impact reports focused on marketing and customer experience including "The Customer Experience Journey" and "Experience-Based Differentiation."
 - Created Forrester's Customer Experience Index that rates 100+ organizations.
 - Forrester's most-read analyst for 10 consecutive quarters, spanning 2.5 years. In latest quarter, readership was 75% higher than next analyst at Forrester.
 - Received "Outstanding Research Award" nine times.
- Business/product development:
 - Grew financial services bookings by 22%; turning around a previous decline.
 - Expanded customer experience offerings to include evaluations of Websites, IVRs, Kiosks, and Cross-Channel interactions. Also expanded training curriculum.
 - Created fast-growing consulting and educational offerings around customer experience transformation
- Dynamic communications:
 - Widely quoted in the press about a variety of topics.
 - Highly rated keynote speaker at several industry events, including top-rated speaker at Forrester's inaugural Customer Experience Forum.

Co-founder and General Manager, NetBroker

1995-1998

Chief Operating Officer, LinkCo

Executive officer of two start-up firms.

- Developed the first pure Internet-based retail brokerage trading engines.
- Developed global operations that spanned Boston, Beijing, Tokyo and Tel Aviv.
- Managed product definition through development for Internet-based projects.

Fidelity Investments, Boston, MA **1993-1995**
Director, Strategic Systems Group

Managed group that developed electronic channels to reach institutional clients.

- Led 30-person organization consisting of development, product management, and QA.
- Led the development of the first institutional money fund trading system on Bloomberg.
- Architected and led development of Windows-based trading and asset allocation system.

Stratus Computers, Marlboro, MA **1991-1993**
Product Marketing Manager

Managed product definition through rollout of technical products.

- Rolled out first RISC-based platform that captured more than \$1 billion in sales.
- Drove business and product planning of database products with Oracle, Sybase, and Informix.
- Received Corporate Excellence Award.

General Electric, Fairfield, CT **1989-1991**
Internal Consultant, Corporate Business Development

Provided business consulting services focused on customer service across several of GE's business units.

- Led multi-team process reengineering effort at Power Generation business.
- Redefined product configuration and channel strategy for electrical gear unit.
- Facilitated large-scale Workout sessions across GE business units.

Sippican, Marion, MA **1985-1987**
Program Manager

Managed \$20 million business area focused on submarine oceanographic products.

- Led proposal efforts to secure various multi-million dollar US Navy contracts.
- Managed R&D and production of high-volume oceanographic probes.

Naval Underwater Systems Center, Newport, RI **1983-1985**
Project Engineer

Designed and developed submarine missile subsystems

- Led development projects for missile subsystems including Tomahawk and SUBROC missiles.
- Won Navy design award for missile launch monitor

EDUCATION

MIT Sloan School of Management, Cambridge, MA
SM in Management (MBA), 1989

- Awarded Proudfoot-Samuels Fellowship for outstanding professional promise
- GPA: 5.0/5.0

London Business School, London, UK
International Exchange Program, Fall 1988

- Single student selected to represent MIT; focussed on international business strategy

Union College, Schenectady, NY
B.S. in Mechanical Engineering, 1982

- Dean's list

SUMMARY OF SELECTED RESEARCH PUBLICATIONS

My research focuses on how large organizations can dramatically improve their customer experiences. This encompasses three components: 1) Insights into what drives consumers; 2) Best practices for designing experiences; and 3) Enterprisewide programs for creating a customer-centric DNA.

The Customer Experience Journey

Why is customer experience such a hot topic? Because it's important, complex, and broken. That's why firms should head toward Experience-Based Differentiation (EBD). But EBD can't be mastered overnight. Instead, companies must embark on a multiyear journey through five levels of EBD maturity: 1) interested; 2) invested; 3) committed; 4) engaged; and 5) embedded. Along the way, firms need to develop customer-centric DNA, a corporate culture with six components that include collective celebrations, commitment to employees, and consistent tradeoffs.

Forrester Big Idea: Experience-Based Differentiation

With more access to information, more sensitivity to price, and less sensitivity to advertising, customers are getting harder to win and keep. Organizations try to woo these empowered consumers with mediocre customer experiences — but it won't work. Firms need to dramatically raise the bar on the customer experience they provide. How? By adopting what Forrester calls Experience-Based Differentiation. This enterprisewide effort focuses on three principles: obsess about customer needs; reinforce brands with every interaction; and treat customer experience as a competence.

The Chief Customer/Experience Officer Playbook

As many firms take on corporatewide efforts to improve customer experience, more of them are establishing positions like chief customer officer or SVP of customer experience — that we collectively call the chief customer/experience officer (CC/EO). To understand what it takes to be a successful CC/EO, we interviewed executives from a variety of firms that currently have those positions. Their insights fell into five categories: 1) Make sure that you've got the right environment; 2) prepare to take on a broad change agenda; 3) establish a strong operating structure; 4) kick off high-priority activities; and 5) look ahead to the future. As these executives start to change the culture in their firms, they are initiating what we call the silent customer experience wars

The Customer Experience Index, 2008

Forrester asked nearly 5,000 consumers about their interactions with a variety of companies, gauging the usefulness, ease of use, and enjoyability of those experiences. Based on these consumer responses, we calculated the Customer Experience Index for 114 firms in 12 different industries. Barnes & Noble and USAA topped the rankings, while Charter Communications and Medicaid came in at the bottom. Only 11% of the firms wound up with "excellent" ratings — and 38% were "poor" or "very poor."

Five Disruptive Customer Experience Strategies

Forrester's research uncovered five distinct customer experience strategies that companies use to disrupt an industry: ultrasimplification, online infusion, service infusion, service amplification, and value repositioning. While these strategies may not make sense for all firms or all industries, every company should expect at least one of these approaches to challenge the status quo in their industry.

Building Your Voice Of The Customer Program

Many companies say that they don't have a good connection with customers. That's why firms should consider developing a systematic approach for incorporating the needs of customers into the design of customer experiences; what Forrester calls a voice of the customer (VoC) program. Successful VoC programs will incorporate listening, interpreting, responding, and monitoring. As customer experience professionals roll out VoC programs, they should be prepared to overcome internal organizational obstacles.

The Gen Y Design Guide

Gen Y consumers are a unique breed. But what exactly makes them different from their elders? Our research unearthed nine attributes of Gen Yers' social, emotional, and mental makeup that shape their perception of interactions. To reach these young consumers, we've identified four design approaches: immediacy, Gen Y literacy, individualism, and social interactivity. To truly engage Gen Y, firms should create a Gen Y advisory board and apply Gen Y design approaches across touchpoints.