

Guide: Staged Experience Audit

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Part 1: Overview

Experiences are a packaged set of behaviors that are delivered to customers, employees, and other key stakeholders. An experience is an encounter an individual has with your company, its employees, and/or its products and services that engages them on a physical, emotional, intellectual, and/or spiritual level.

Staged experiences are pre-planned interactions that are orchestrated by your company's employees. These are events that customers, employees, and other key stakeholders participate in passively or actively. Staged experiences are a primary delivery vehicle of the benefits that motivate customers, employees and other stakeholders to take desired actions (buy your stuff).

For an experience to be considered a staged experience you should be able to positively answer each of the following questions:

1. Is the idea an organized, consistently delivered process or program?
(This carries the most weight.)
2. Does it deliver a clearly identifiable meaningful benefit for a specific audience?
(You can describe either a functional or emotional benefit.)
3. Can you name the event, process, or program?

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Part 2: Conducting an Experience Audit Contest

The purpose of this exercise is to uncover the existing staged experiences that your company is already doing. It is important to conduct this audit prior to creating new ideas for staged experiences simply because employees are somewhat familiar with the existing experiences and your company has already invested resources to implement them. In some cases, company leaders find that they already have enough staged experiences that need to be perfected and that adding new experiences is not in the best short-term interest of the company.

How to set up the Staged Experience Audit Contest

1. Gather together 10 to 20 employees and divide the participants into 3 equal teams.
2. Pick a meaningful prize that will be awarded to the team that comes up with the most unique staged experience ideas. A unique staged experience is one that no other team came up with.
3. Choose a team captain for each team. Explain that each captain is responsible for aggregating his/her team's ideas and presenting the results (the team captain should be ready to explain what an idea is if it is unclear). Send the group off to brainstorm experiences that your company is currently doing.
4. Collect data, aggregate per team, and determine which team came up with the most unique ideas. When reviewing the experience results from the different teams, be sure to keep track of which team came up with each idea. Only unique ideas (ideas that no other team came up with) earn points. The team with the most points wins.
5. Present the results back to the group and distribute the prize (it's a good idea to also give all three captains a reward).
6. See audit guide below for details on collecting and analyzing the participant data.

Analyzing the results

1. Review all input and make note of:
 - Ideas that are clearly staged experiences.
 - Anything you think might not be more than a behavior.
 - Ones you are not sure how to interpret.
 - Products or service offerings (these are not staged experiences).
2. Review input with each team captain to go over each item and seek any needed clarification.
 - Don't accept services or products provided as staged experiences.
 - Make a list of any potential staged experiences. These are the items that are not done consistently, but were noted because they have potential. This would be the case if you've done an experience a few times but have very little or no structure in place for continuing it in the future.

When reviewing the input with the team captain, make sure to remind him/her of the criteria for a staged experience at the beginning of the conversation. This will help the captain understand what you are looking for. Make sure you can answer yes to the three criteria questions below.

1. Is the idea an organized, consistently delivered process or program?
(This carries the most weight.)
2. Does it deliver a clearly identifiable meaningful benefit for a specific audience?
(You can describe either a functional or emotional benefit.)
3. Can you name the event/process or program?

Take the team captain through each submitted staged experience idea and ask clarification questions to determine if the idea meets the three criteria. Here are some questions to ask when determining the validity of a staged experience idea:

- Is there a process or approach in place?
- Who delivers the experience?
- How often is the experience delivered?

Delete anything that is not deemed to be staged experiences. Re-name ideas if it will make them easier to understand.

Use the following template to aggregate the data from all three teams.

Existing Staged Experience	Audience (Who is it for? Customers? Employees? Both?)	Brand Lens Concept (Which concept does this experience pertain to?)	Team Credit
1.			
2.			
3.			
4.			

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Part 3: Ranking Consistency and Importance

Now that you have aggregated all the data from the Staged Experience Audit, you can have the team rank each existing staged experience for consistency and importance. Doing so will help you to narrow down the list to ideas you should continue investing resources into and those you should stop putting company time, energy, and money into because they are off-brand or not as high impact as others.

1. Send each participant a list of all the existing staged experiences developed in Part 2. Have each participant individually rank each experience using the scale below.

Importance	Consistency
1 = Unimportant	1 = We never do this staged experience.
3 = Not very important	3 = We rarely deliver this staged experience.
5 = Somewhat important	5 = We sometimes do this staged experience. Some people do it and some don't.
7 = Very important	7 = We almost always do this staged experience.
10 = Extremely important	10 = We always deliver this staged experience. We have the process in place and are very consistent.
N/A = I do not know enough about this experience to rank its importance or how consistently we do it.	

2. We recommend using an online tool such as SurveyMonkey when conducting a ranking, but you can also do it in a simple table in MSWord or MSExcel.

When reviewing the ranking ideas, pay particular attention to existing staged experiences that are deemed important yet are inconsistently delivered. These are the ones that need the most attention moving forward.