

Starbucks Research

Global CRM System



Research Overview



Project Background

Scenario

- Starbucks North America recently acquired a CRM (customer relationship management) system to improve the relationship between Starbucks and their existing partners and licensees. The international retail team at Starbucks wanted to adopt the CRM system to improve relationships with partners and licensees on a global scale.



Problem

- The Starbucks team did not have the understanding nor resources to know the shared needs of the entire international retail team ecosystem. If the international team were to adopt the CRM system, what are the top shared priorities for MVP?

Objective(s)

- Understand who stakeholders are and their needs throughout various functions within the international retail team.
- Discover MVP features that can deliver on high priority business requirements.
- Discover additional features for future consideration (post-MVP).

My Role

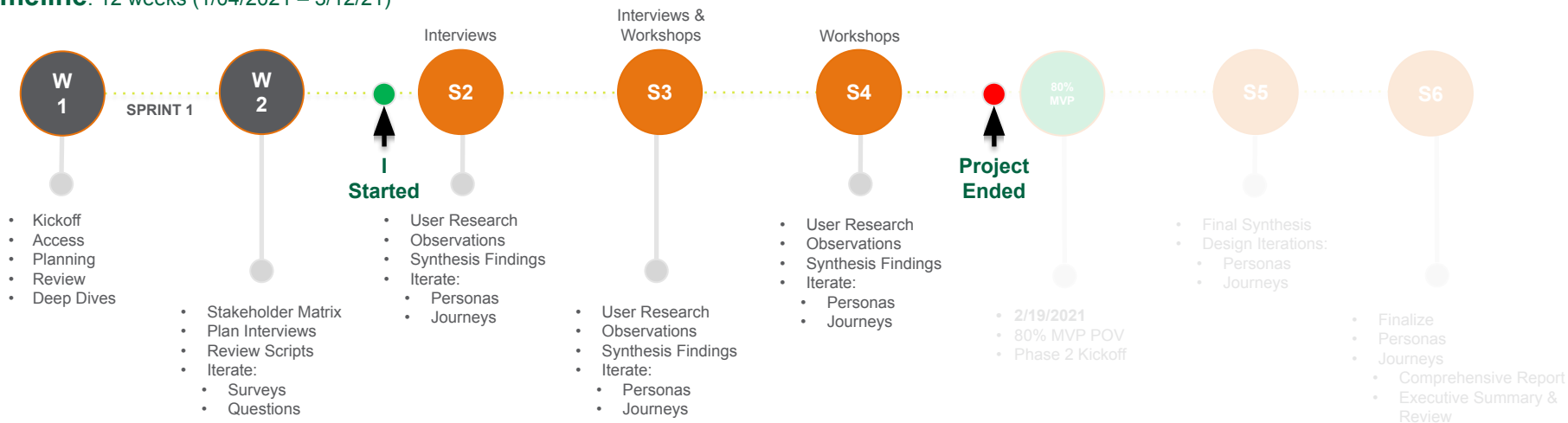
Lead UX Researcher



I was brought onto the project 2 weeks after project kickoff as a UX Researcher. Within 3 days I was promoted to Lead UX Researcher after taking initiative on producing research plans, research strategy, and built relationships with Starbucks stakeholders.



Timeline: 12 weeks (1/04/2021 – 3/12/21)



Research Methods



Remote Semi-Structured Interviews



Why Semi-Structured Interviews?



Understanding top priorities as well as attitudes and behaviors of Starbucks employees needed to be captured. We also needed to processes of potential primary CRM system users (Tier 1) and their supervisors (VPs and Directors) within each function. Additionally, the client wanted to ensure that all 106 stakeholders had their voices heard.



Group Workshops



Why Workshops?



I educated and set expectations with Starbucks that, while we can interview everyone, our analysis will be based on 10-15 individual interviews in order to remain within scope and to limit repetitive insights. All interviews must be completed by a specific time in order to analyze and provide insights. To compromise reaching all stakeholders, Starbucks agreed to group secondary stakeholders (Tier 2) within the same functions together to conduct large workshops rather than individual interviews.

Group Workshops

Overview



19 Workshops (5-7 participants each)



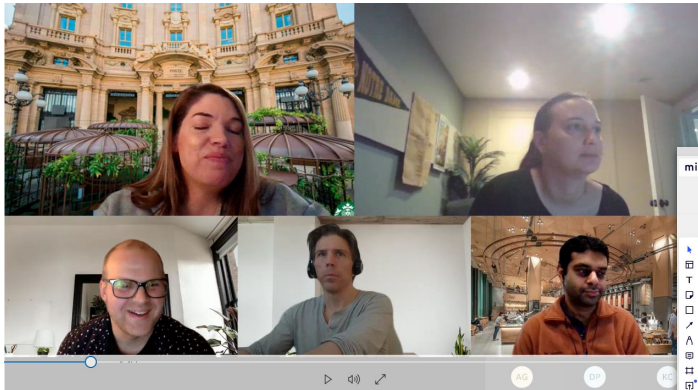
Research Plan



MS Teams - Recordings



Miro - Affinity Boards



Function	US / Global	AP	EMEA	LAC	Channel
Business Development/ Strategy/Overall	Individual Interview	Workshop	Workshop	Workshop	Individual Interview
Legal	Individual Interview	Workshop	Workshop	Workshop	Individual Interview
ST	Individual Interview	N/A	N/A	N/A	Individual Interview
Operations	Individual Interview	Workshop	Workshop	Workshop	Individual Interview
SCO & GFSQR	Individual Interview	Workshop	Workshop	Workshop	Individual Interview
CMP	Individual Interview	Workshop	Workshop	Workshop	Individual Interview
Store Dev	Individual Interview	Workshop	Workshop	Workshop	Individual Interview
Finance & Accounting	Individual Interview	N/A	N/A	Workshop	Individual Interview

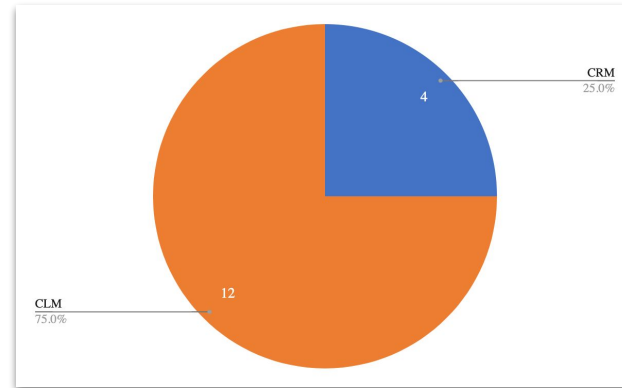
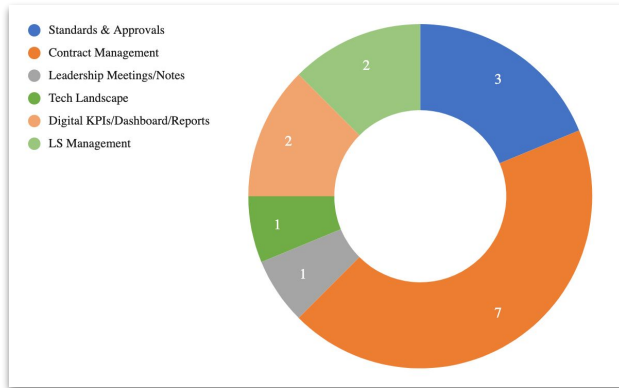


Remote Semi-Structured Interviews

Key Findings



Weekly insights were presented to client to show progress of research findings. The insights were showing participants prioritizing a contract library (CLM) over a customer relationship system (CRM).



Do to these insights, we recommended Starbucks consider prioritizing a CLM system. Starbucks agreed, which is why the project ended early to reconsider their focus.

Deliverables

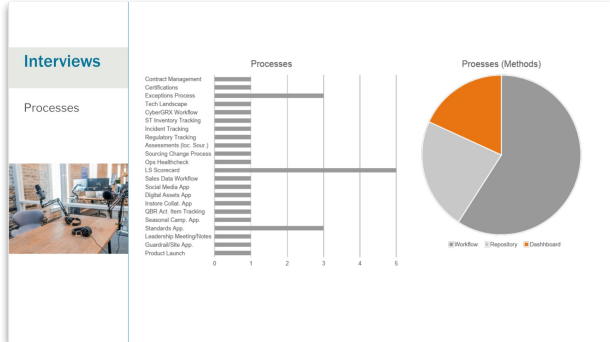


Weekly Insights

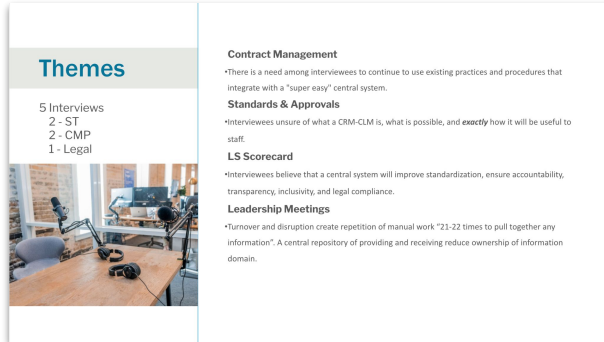


Every Friday morning we would provide a quick high-level look at the progress of our research findings. Progress week over week showed rough analysis of interview prioritization, common themes, and major callouts from workshops.

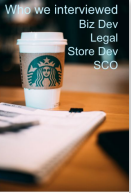
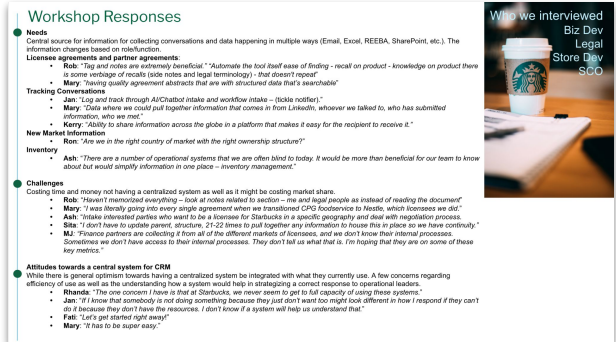
Interview Analysis



Common Themes



Workshop Callouts



Deliverables

Personas



We identified 4 major personas that we were to deliver by the end of S6. Due to the project ending early, we were only able to deliver 1.



Licensee - Completed



Manager - Incomplete



Director - Incomplete



Analyst - Incomplete



STORE TYPE Casino
JOB TITLE Director of F&B
EMPLOYMENT Salary, Full-time
TIME IN ROLE 6 years
LOCATION Las Vegas, NV
DEMOGRAPHICS 48 / Female

CHARACTERISTICS

LEADER AMBITIOUS

DETAIL ORIENTED GROWTH

OPERATIONAL AUTOMATION

TECH EXPERIENCE

- I shop online on my phone & laptop.
- I like sites where I can save my favorite items.

Less Experience More Experience



LICENSEE

Liz Carter

"We need to get rid of the manual process. It introduces errors that change our actual cost of orders. We want to rely on an automated system."

ABOUT

I have 20 years of experience in the F&B industry and currently manage 35 restaurants, including several Starbucks. I love what Starbucks offers our guests, and I enjoy the drinks myself.

Starbucks is just one part of our portfolio, but they require the most hands-on effort by our accounting team. My goal is for us to spend less time on work that could be done automatically.

MOTIVATIONS

- Align with companies like Starbucks who have high expectations for customer experiences, quality products, and established practices.
- Reallocate our people to raise customer experience value over doing manual work.

GOALS & TASKS

- Continue migrating vendors and staff to our modernized PO system.
- Simplify our invoices. Stores place multiple orders and we get multiple invoices for the same shipment.

CHALLENGES & FRUSTRATIONS

- Starbucks doesn't integrate with our systems and we have to create manual work arounds. Many of these are done with paper and pen.
- We run into errors. When a PO and invoice are off, payments are late, and our accounting team cannot process these.
- We have a lot of turnover at all of our locations. It's a lot of time to train.

BEHAVIORS

- I'm always on the go so I can check in with my teams and put out various fires.
- I meet with our managers weekly to review issues and progress on our goals.
- Device: iPhone and Laptop.

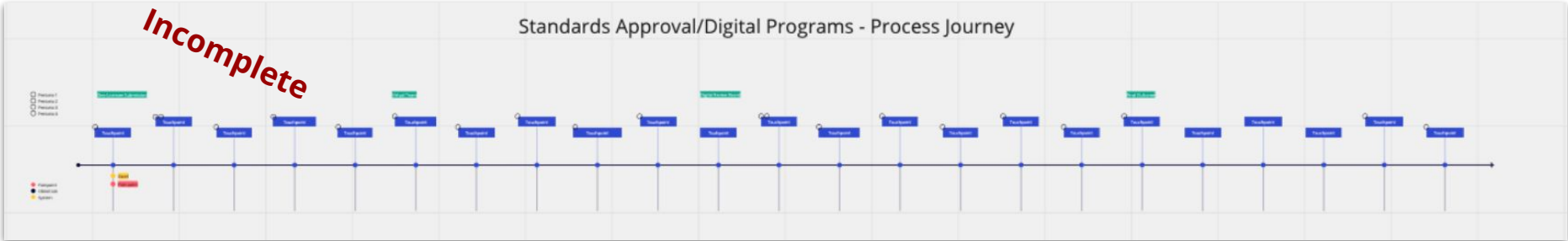
LIZ'S TIP: BLANKET PURCHASE ORDER TESTING

Some of our stores are testing out using a blanket PO. It's not ideal, but they place an order and attach the contents of that order to a PO number in our system that's already created so we can track it with the rest of our vendors.

User Journey Map



To provide the international retail team insight into the ecosystem of how an entire process works (end-to-end), we recommended that the user journey map become a “*process journey map*” to show how all personas interact in a process and where a CRM/CLM could have impact. Unfortunately, the research project before the delivery date and the map could not be completed.



End



Learning Experience

- How to compromise
- Quickly get up to speed
- Guiding & educating
- Knowing when to quit