

## How Service Providers Manage the Customer's Service Value Experience throughout the Customer Journey: A Multiple Ethnographic Study

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### ABSTRACT

**Purpose** – In service marketing theory and practice, it is increasingly accepted that service value experience (SVE) is phenomenologically determined by the beneficiary. The creation of SVE is based on a temporal and dynamic process in which customers actively participate. However, little is known how service providers manage SVE throughout the customer journey (CJ). Therefore, we examine through which activities service providers manage the SVE of customers in multiple phases of the CJ.

**Design/methodology/approach** – We conducted ethnographic research at two training and IT consultancy firms including their customers, with each having intensive customer interaction throughout the CJ. We focus on critical events and analysed how both firms managed the SVE as a collective effort before, during and after service encounters in various phases of the CJ such as problem analysis, orientation, negotiation, purchase, implementation and usage in terms of trainings, IT applications or consultancy activities, evaluation and follow-up.

**Findings** – Managing SVE appears to be a critical act for service providers. We demonstrate the fragile, dynamic and temporal nature of SVE and uncover eleven facilitating SVE activities and four destructing ones. In prepurchase phases: thorough problem analysis, constructive advice, decisive and solution oriented behaviour and tailored offerings are imperative. Especially during the purchase phase showing empathic and solution oriented behaviour on behalf of the service provided appears to be important for SVE to flourish. In usage, we found that ad hoc 'repair work' is required to realign SVE with initial expectations. In final CJ phases proactive and decisive behaviour in combination with activities of early CJ phases are revealed as important to stabilise the SVE. While these activities are identified as SVE enhancing, the following behaviours appear to be destructive: uncoordinated SVE management, customer avoidance, slow response in the face of critical events, and opportunistic and insistent sales approaches in some cases even beyond repair.

**Implications** – This study advances the literature on SVE management by proposing activities that are value facilitating and/or value destructing in the management of SVE by service providers across the CJ. For practitioners aiming to improve the SVE throughout the CJ, we provide key activities that facilitate SVE and warn about SVE destructing activities. A crucial managerial implication is that SVE management is a collective and carefully coordinated effort involving multiple activities in the various stages of the CJ.

**Originality/value** – This study is the first to shed light on service providers' activities in SVE management throughout the CJ. We provide – through rich and fine-grained ethnographic data – a novel contribution to this endeavour by examining and uncovering critical SVE facilitating and destructing practices in different phases of the CJ.

**Key words** – Service value experience, activities for service value experience facilitation and destruction, micro dynamics, customer journey, ethnographic study, knowledge intensive consultancy and training firms

**Paper type** – Research paper

## INTRODUCTION

Customer experience has emerged as a core concept in marketing in the last three decades and it receives increasing attention. In becoming more customer-centric, organisations massively adopt experience with a C-level priority and create entire departments that focus on building a solid customer's experience. The customer's experience forms the core of service provision and customer engagement (Zomerdijk & Voss, 2010) and is the fundamental premise for all business (Helkkula, 2011). The management of experience becomes more challenging because customer journeys become more complex in today's business contexts. Customers are in contact with service providers through myriad touchpoints (Lemon & Verhoef, 2016). As such, service providers find it challenging to manage the customer's experience throughout the customer journey (henceforth, CJ) (Edelman & Singer, 2015; Rawson, Duncan, & Jones, 2013) and related literature remains scarce (Lemon & Verhoef, 2016).

Value lies at the very heart of experience as well as contemporary service marketing (Jaakkola, Helkkula, & Aarikka-Stenroos, 2015) and is a crucial goal in marketing practice and theory. In both domains it is increasingly accepted that value is phenomenologically determined by the beneficiary and experiential in its nature (Vargo & Lusch, 2016). Since value lies at the heart of a customer's experience in service we advocate to use and continue with the 'service value experience' (henceforth, SVE). Given the phenomenological nature of SVE (see for example Ellway and Dean (2016); Helkkula, Kelleher, and Pihlström (2012); Sahhar and Loohuis (2017); Schembri (2006)) we define SVE as a the customer's subjective interpretation of service shaped by the temporal, contextual and dynamic nature of the customer journey. It is this phenomenological process that in direct or indirect interaction with service shapes a customer's SVE.

In general, scholars advocate for a managerial relevant understanding of value related concepts (Grönroos, 2017; Grönroos & Voima, 2013). For SVE to be managerially understandable, such phenomena should be analysed at micro level. Despite interest in how customers experience value (see for example Ellway and Dean (2016); Helkkula et al. (2012); Sahhar and Loohuis (2017); Yakhlef (2015)) and approaching experience in the CJ (see for example Lemon and Verhoef (2016)), how service providers manage the customer's experience across phases of the CJ remains a blackbox (Ostrom, Parasuraman, Bowen, Patrício, & Voss, 2015). Thus, scientific knowledge remains scant about how service providers accommodate and facilitate SVE. More specifically, we know little about what concrete activities they perform in facilitating customers and meeting their expectations. For instance, we do not know which activities facilitate or destruct the customer's SVE in the CJ process. Before taking a pragmatist stance and aiming on what service providers should or should not do in SVE management, we first should create an understanding what companies do in terms of SVE management activities. Therefore, the present paper adopts a realist approach in resolving this omission. As such, we explore the following research question: "Through which activities do service providers manage the SVE of customers throughout the entire CJ?".

In answering this research question, we employ research casuistry consisting of two training and IT consultancy firms with each having intensive customer interaction and similar CJ trajectories. We adopt an ethnographic approach and a micro dynamic lens. This allows us to come as close as possible to SVE management activities. In our research we use the following steps in the CJ: 1) trigger & problem analysis, 2) orientation & negotiation, 3) choice & purchase, 4) implementation & usage and 5) evaluation & follow-up. First, we focus on service provider activities with a special focus on the critical incidents that happened in the various stages of the CJ. After that, we could further scrutinise each incident based on the type of activities conducted by the service provider. We include the outcomes of these activities in terms of SVE facilitating or destructing on behalf of the customer.

This study advances contemporary theory and practice by uncovering through what activities SVE is managed across CJ phases in a knowledge intensive business context. First, we show that SVE management by service providers is a critical act and comprises of carefully balancing distinctive activities with the customer's SVE. We uncover eleven crucial service provider activities which are important for facilitating the SVE and also introduce four activities that destruct SVE. Through creating patterns in activities across the entire CJ, our third contribution is that we open up novel strategies for service providers what to do in which phase of the CJ to facilitate SVE. Finally, we open up avenues for future research to deepen SVE from at a micro level.

The remainder of this paper is organised as follows. It opens by giving a brief overview of how the phenomena of CJ and experience have been conceptualised and investigated in literature to date. Subsequently we discuss our research design and methodology followed by our findings. Finally, this paper closes with concluding remarks that includes a summary of our findings, discussion and contributions, managerial implications and avenues for future research.

## **THEORY**

### **Customer Journey**

Extant literature shows a significant interest in approaching experience from a CJ perspective. In the past, the moment of exchange only towards the entire journey of customers. Nowadays, CJs are often used in creating insight into customer's experiences. It addresses the processual and experiential aspects of service from the customer's point of view (Følstad & Kvale, 2018). More specifically, a CJ depicts the events/phases, whether purposively designed or not, that customers go through and somehow get in touch with service providers' offerings. It displays how the journey of customers looks like and shows when and how they experience touchpoints with service providers. The experience of customers in the various phases of the CJ is dynamic which makes it challenging for organisations to thoroughly comprehend. It makes it more challenging that phases in CJs are often not linear but iterative and dynamic (Lemon & Verhoef, 2016). In order to made the CJ more manageable, a distinction is made

between the phases prepurchase, purchase and postpurchase (Lemon & Verhoef, 2016). Still, this approach remains largely purchase focused. Others focused more on the decision phases of customers in their journey, ranging from awareness, familiarity, consideration, purchase to eventually loyalty (Court, Elzinga, Mulder, & Vetvik, 2009).

However, touchpoints may commence long before any actual physical touchpoint between customers and service providers and may continue independent of the service provider long after any contact has ended (Grönroos, 2017; Norton & Pine, 2013). It is not solely during moments of interaction between the customer and the service provider that the customer's experience is shaped but also before and after (Berry, Carbone, & Haeckel, 2002; Berry, Wall, & Carbone, 2006). In this spirit, experience may even be shaped between touchpoint due to mental reflections (Grönroos, 2017). Although out of scope in this paper, this argument shows how critical the customer's experience is throughout CJ and that service providers cannot always influence it.

In the next section, we first discuss literature about experience before merging CJ with experience literature.

## **Experience**

Understanding customer experience is at the core of marketing literature (see for example Ellway and Dean (2016); Helkkula et al. (2012); Sahhar and Loohuis (2017); Schembri (2006); Schembri and Sandberg (2002); Vargo and Lusch (2004, 2008, 2016); Yakhlef (2015)). The concept of experience became key in attaining satisfied and loyal customers (Grewal, Levy, & Kumar, 2009) and as such is the ultimate goal for organisations including its service offerings (Jaakkola et al., 2015; Verhoef et al., 2009). However, the term customer experience remains ambiguous. Scholars often intermingle the terms 'customer experience' and 'service experience'. In the former, the customer is the focal point where in the latter the subject of experience stands central. Despite these minor differences as other scholars suggested (such as Klaus and Maklan (2012)) we depict both terms as synonyms.

Recent service literature (both in the Service-Dominant Logic (SDL), Service Logic (SL) and other similar marketing streams) points out that the concept of value forms the core of both experience and creation in which the customer is both interpreter and contributor (Gummerus, 2013; Sahhar & Loohuis, 2017). The customer is seen as the 'arbiter' of value and it is thus value that the subject experiences. Value is experiential in nature and phenomenologically determined by the beneficiary (Vargo & Lusch, 2008, 2016). Instead of putting the production of outcomes central, the SDL and SL steers us towards thinking how these outcomes are contextually and idiosyncratically interpreted and experienced by the customer over time (Jaakkola et al., 2015). Experience is a sequential, dynamic and non-linear phenomenological event (Edvardsson, Enquist, & Johnston, 2005; Helkkula, 2011) that can be experienced in the past, present and future.

Notwithstanding the valuable contributions of fellow scholars above, we advocate to more dominantly involve the concept of value. Therefore, we insert it and advocate to continuing with the concept of ‘service value experience’ (SVE) which we define as the subject’s phenomenological interpretation of value through coming in touch with service.

In the following section, we discuss literature on managing SVE throughout the CJ.

### **Managing SVE throughout the CJ**

Contemporary literature shows that a few scholars studied SVE management throughout the CJ, each from different perspectives. For example, some (Van Vaerenbergh, Varga, De Keyser, & Orsingher, 2018) tapped into how service providers restore experience in cases of service failures. Instead of making service failures recovery part of a regular CJ, these scholars advocate for a so-called ‘Service Recovery Journey’. In this, service providers contribute to experience through organisational responses such as compensation, favourable employee behaviour and organisational procedures in prerecovery, recovery and postrecovery phases that collectively contribute to ‘recovery experience’ of customers (Van Vaerenbergh et al., 2018).

A more practice-oriented lens towards managing SVE throughout the CJ brings us to scholars suggesting to organisations to adopt technical service and support solutions (Rawson et al., 2013). This might both technicians and first line employees to seamlessly engage customers at the right moment and in the correct fashion. Especially in today’s multichannel environment, organisations might benefit from such tools in managing the SVE throughout the entire CJ to delivering a seamless experience between channels.

Yet, we know little about what service providers do in terms of activities to manage the customer’s SVE across the CJ. In the next chapter, we put forward how we empirically approach this problem.

## **METHODS**

To explore through which activities service providers manage SVE, we conducted an interpretive multiple case study. This section commences with a description of our research design and cases followed by our data collection and analysis.

### **Research design and cases**

Our objective is to study the activities through which service providers manage the customer’s SVE throughout the entire CJ. Our objective of coming as close as possible to SVE management activities prompted us to adopt a theory building qualitative case study approach involving intensive ethnographic research. Such research examines the subject’s ‘lived experience’ first hand through creating thick descriptions (Geertz, 1994; Herbert, 2000; Van Maanen, 2011; Visconti, 2010). We use this approach

because it is suitable for arriving at an in-depth understanding of phenomena in real time. In our case the SVE management activities between the customer and the service provider. This is in line with scholars advocating for ethnographic approaches in marketing (see for example Grönroos and Voima (2013) and Norton and Pine (2013)).

Our data comprises an ethnography of two Dutch training and IT consultancy firms. We name them for illustrative and confidential purposes ‘MonITor’ and ‘Train&Co’. MonITor provides complex IT solutions and Train&Co professional development training in terms of hard and soft skills and both provide complementary consulting and training services. Both companies are located in the east of The Netherlands but are reputable in providing services nationally. Each of them has intensive customer contact which made it for us an interesting and rich context to observe.

### **Data collection**

In our data collection, we mainly focused on critical events which we depict as events in customer’s SVE is somehow altered. By specifically focusing on these events, we were able to investigate what service providers did in terms of SVE management activities and with what effect.

In accordance with ethnographic practice, one of us immersed on average two and a half days a week over a period of eight months with representatives of both firms. He travelled mainly with representatives such as account managers, directors, consultants and trainers. Together with them he attended meetings at customers (e.g. first acquaintances, information gatherings, kick-off sessions, formal management meetings, kick-off sessions for large projects and customer and partner forums) as well as internal formal and informal gatherings (e.g. weekly stand-ups, management sessions, lunches). Besides that, he took in-depth one-to-one interviews with customers as well as employees of both firms and organised a handful internal workshops to become familiar with the companies’ offerings, industry and customer interaction. The ethnographer immersed himself into a couple of training sessions and was occasionally involved in email correspondence between employees and customers. Finally, he took carefully note of his own experiences, thoughts and feelings during all of the above. Everything was detailly captured in audio, written and/or photographic records. For preparing our data analysis, all audio recordings were transcribed to verbatim.

### **Data analysis**

We used a theory building approach in analysing our data. This involved moving from the perspective of the ethnographer – consisting predominantly of thick descriptions based on the above mentioned data – to one that was more analytical and entwined into current research (Lok & De Rond, 2013; Van Maanen, 1979). This involves an iterative process meaning that we travelled back and forth between the data, literature and an emerging structure of empirical categories, which involved cyclical reading and analysing of all data (Lok & De Rond, 2013; Miles & Huberman, 1994).

We commenced our data analysis with identifying phases in the customer's journey. In doing so, we approached the CJ holistically and created several phases from the bottom up. We distilled five generic steps that were applicable for both cases. First – trigger and problem analysis – in which customers are triggered by something and analyses the problem. In phase two – orientation and negotiation – customers orient themselves towards a solution and negotiate with service providers for a possible solution. Third – choice and purchase – in which the customer makes a choice and purchases the solution. In phase four – implementation and usage – the customer possibly implements (most often together with the service provider) and uses the actual offering. Finally in evaluation and follow-up, the customer evaluates upon the service provider's overall service and solution and gives a follow-up, either in terms of being loyal to the service provider or looking for a different solution elsewhere. This phase also includes features such as service safeguarding.

The CJ provided support in further arranging and analysing our data. We went through our data in which we specifically looked for critical events. Typical about these events is that the customer's SVE is somehow altered, not stable or in question, which represents the temporal and dynamic characteristics of SVE. For every event, we noted when it happened during what phase in the CJ and arranged the event accordingly. In every event, we described the actual critical incident followed by the action the service provider took and the outcome for the customer in order to conclude something about the effect of the service provider's action for the customer. By including the effect of the service provider's action on the customer, we could make a distinction in actions that manage, restore, maintained or in some way positively contributed to the customer's SVE and ones that did not (i.e. destructed SVE). Through following this order, we were capable to create cases of the same structure and order of magnitude while still preserving as much of the richness of our data as possible.

In our final phase of analysis our aim was to distil crucial service provider activities. This commenced by adopting an open coding strategy where we analysed every case in detail to filter out a myriad of categories (Gioia, Corley, & Hamilton, 2013; Strauss & Corbin, 1998). We progressed with axial coding to look for similarities and differences in categories. This process reduced all germane categories into a more manageable group of categories (Gioia et al., 2013; Strauss & Corbin, 1998). Subsequently, we outlined all categories and cross linked them with the CJ phases. This allowed us to create patterns in what activities were in which step of the CJ more relevant than others.

In order for our message to be cohesive and readable (given the large amount of data while still anchoring detail), we initiate our findings by illustrating eleven cases across phases of the CJ. We describe every illustration in detail (all other cases are laid out in the Appendix in which the eleven illustrative cases are highlighted). We conclude our findings by showing the patterns we discovered in service provider activities to manage SVE across the entire CJ.

## FINDINGS

Our findings include eleven service provider activities in managing the SVE of customers. Besides these activities that facilitate SVE, we also identified four activities that destruct SVE. These are shown and defined in Table 1. In the first subsection we discuss – in the flow of the CJ – all service provider activities through eleven of the in total eighteen illustrative cases. The second subsection unfolds the patterns of activities across the CJ.

*Table 1 – Facilitative and destructive service provider activities in managing the customer's SVE*

<i>Service provider activity</i>	<i>Description</i>
<i>Facilitating SVE</i>	<ol style="list-style-type: none"> <li>1. Solving problems ad hoc The service provider solves the problem at hand immediately in situ</li> <li>2. Repairing the situation The service provider conducts repair work in order to temporarily stabilise the situation</li> <li>3. Analysing the problem thoroughly The service provider analyses the customer's problem carefully through for example asking critical questions or performing a root cause analysis</li> <li>4. Advising constructively The service provider consults the customer in a constructive and adequate fashion in what's best for the customer</li> <li>5. Tailoring value promise The service provider customises its offering to the customer's situation and needs</li> <li>6. Acting solution oriented The service provider undertakes action that accommodates or are steered towards a solution for the customer</li> <li>7. Acting decisively The service provider behaves resolutely and firm through for standing its ground</li> <li>8. Empathising in customer The service provider tries to understand the customer's situation through empathetic behaviour</li> <li>9. Advising proactively The service provider consults the customer proactively and in advance</li> <li>10. Managing expectations The service provider manages the customer's expectations in advance to ensure alignment</li> <li>11. Managing relation strategically The service provider takes care of the supplier-customer relation that accommodates a long-term collaboration</li> </ol>
<i>Destructing SVE</i>	<ol style="list-style-type: none"> <li>A. Managing SVE uncoordinatedly The service provider lacks careful and coordinated management both in terms of actions and behaviour</li> <li>B. Communicating slowly The service provider communicates lousy which prevents the customer of help or a solution</li> <li>C. Acting avoidantly The service provider acts reluctantly and through non-facilitating behaviour</li> <li>D. Selling opportunistically and insistently The service provider adopts a too opportunistic sales approach and insists on own commercial opportunities</li> </ol>



## **Service provider activities in managing SVE**

This section lays out eleven illustrations that case-wise describe what activities service providers perform to manage the customer's SVE. Each illustration is described and analysed in detail.

*Illustration 1 (case 1.1) – The service provider analyses the customer's problem thoroughly and advises constructively in the customer's trigger and problem analysis phase*

A first meeting between Train&Co and an HR manager from a governmental organisation takes place. Yet, the organisation is a potential customer for Train&Co but the HR manager got in contact with Train&Co through facing challenges within the organisation. Now, the account manager and trainer from Train&Co meet with the HR manager for an acquaintance. They discuss the current situation at the customer's organisation and the challenges the customer faces. It seems the HR manager has difficulties pinpointing exactly where the problem lies. This is a critical moment in the trigger and problem analysis phase the customer is in because it causes doubt and insecurity for the customer.

Through having dialogue, the account manager and trainer ask triggering questions to the HR manager to find out more about the situation. It is clear the two representatives from Train&Co thoroughly investigate the situation and problem. After the HR manager describes the current situation which seem to lack any policy, the trainer confronts her in a polite and correct way.

“If I may confront you? ... It already struck me a bit. When the current situation tells me that if a citizen breaks the rules three times, that person apologises and only gets a warning, some things are not in place. I can imagine that you want to give people a second chance, for sure, but in the ideal situation your organisation should implement new policies and should be very consequent in following these policies. If a citizen breaks the rules, your employees should report the police. And I understand you cannot oblige your employees to make a report, but you as an HR department can take responsibility and do the reporting yourself.” [Train&Co – trainer]

After the trainer's confrontation, he advises carefully possible routes for improvements. The customer comes to new insight about what exactly the problem is and how Train&Co can help.

“That strikes me. I think you're right regarding that. We have been discussing several issues internally with our legal department, but your idea is new to us. It often happens that our employees are directly affected by the incident and they do not want to report to the police. So far, we thought, one way or the other, the employee is responsible for this. Acting upon the incident, that is the current difficulty and the point of discussion yes...” [Customer – HR manager]

Through first, analysing the problem thoroughly followed by providing advice constructively, the account manager and trainer were able to exceed any expectations of the customer. The HR manager is positively surprised by the analysis the account manager and trainer gave. Also, the advice is clear to the HR manager. Through this, they positively managed the SVE of the HR manager.

*Illustration 2 (case 2.3) – The service provider acts solution oriented and manages the relation strategically in the customer’s orientation and negotiation phase*

An IT supplier of several municipalities orients and explores possibilities for an IT solution. One of the candidates for supplying the IT solution is MonITor. The project leader investigated at other organisations how they experienced the service of MonITor. Out of eleven respondents, he all got the same answer. Every other organisation that has experience with MonITor as a service provider has a positive SVE. Out of all parties, two parties pointed out that they experienced a critical moment when MonITor changed personnel because one of their consultants found a job elsewhere. The consultant was already involved during the whole trajectory and built trust at the customer. For the project leader, this forms a critical moment in his orientation and negotiation phase since it provides him with valuable information in making his choice.

In that specific case, MonITor acted immediately when it was known their consultant left. Besides that, employees from MonITor acted solution oriented and managed the relation carefully. The consultant who was familiar at the customer arranged a ‘warm handshake’ between his colleague consultant and the customer. The customer was happy to be introduced to the new consultant by the previous one. It created trust and the customer was happy MonITor immediately took action and arranged everything in an orderly manner. Besides the fact that the SVE of the customer was somehow altered by the fact the consultant left, MonITor acted in a way that provided the customer with the best possible solution while at the same time managing the relationship well.

*Illustration 3 (case 2.4) – The service provider analyses the problem thoroughly, acts decisively, advises proactively and manages expectations in the customer’s orientation and negotiation phase*

The Learning and Development (L&D) manager from the customer’s organisation, points out she and her colleagues created insight into personal development training needs of employees. The two departments that are scheduled to follow a training have different needs. The employees of one department want a maximum of one day training and the other only half a day. During the meeting with Train&Co’s account manager and trainer, the L&D manager points out an important hurdle. The employees seem to be training averse. Beside the fact the situation clearly shows that the L&D manager faces problems herself, this critical event withstands Train&Co to deliver a fluid SVE in the customer’s orientation and negotiation phase.

During the meeting, especially the account manager gives first of all pushback on the needs of the employees followed by questions to understand the situation. Below depicts how the conversation iteratively went along where the account manager and trainer aimed to understand the problem in-depth while acting in a decisive manner. They manage expectations of the customer to communicate what is feasible and realistic.

“Only half a day?! That’s very short, too brief and something I would not recommend. It’s more like a workshop instead of a real training. But tell me, what exactly is the reason they only want a maximum of one day and half a day of training?” [Train&Co – account manager]

The L&D manager points out:

“I think it has to do a lot with previous experience. I get your point and it doesn’t mean that it counts for every single employee, but it is what we found on average. I know this organisation quite well, and I know that more than one day of training, no.... It sounds cliché but that is impossible with work.” [Customer – L&D manager]

The trainer joins the discussion and gives constructive and feedback in combination with realistic advice:

“Look, in one day you can schedule quite a complete training. I’m able to discuss general theories and concepts. However, in half a day, that’s impossible. Half a day is more like a workshop to give people an idea what the training is about. If you choose for half a day, I advise to involve another half a day to explain the methodology and give some practical exercises to better embed the knowledge in people’s minds and to bridge the theory to practice. This is simply not possible in half a day. And of course, if you insist on your initial ideas, be my guest but I strongly discourage you because it is not effective.” [Train&Co – trainer]

Finalising their discussion, the L&D manager seems to be convinced about the point the account manager and trainer make. She takes their ideas into account, shows more confidence and points out the next hurdle is to convince other internal stakeholders who have control and mandate over budget. The account manager and trainer show proactive advice on a proposal planning. While it is still necessary to overcome other internal challenges, the SVE of the L&D manager is more stable. Moreover, she is relieved to receive support from account manager and trainer of Train&Co.

“I get your point and my proposition is that I will get in touch with the manager of both departments to point exactly out what you mentioned. So I’m going to check what they are capable of. You know, my opinion is, if you already book half a day, it makes absolutely sense to just book the whole day.... One of the managers have great affinity with such topics, so I don’t worry about her. To convince the other is a bigger challenge but we will see. I’ll contact them next week, and I’ll come back to you ASAP. As you suggested, you can then send me a proposal planning.” [Customer – L&D manager]

*Illustration 4 (case 2.6) – The service provider tailors its value promise to the customer’s needs, acts decisively, empathises in the customer and manages the relation strategically in the customer’s orientation and negotiation phase*

The customer’s HR manager of a health organisation is responsible for development of their employees on a strategic, tactical and operational level. With orienting towards suppliers, she selected two service providers to further discuss possibilities for providing a wide range of personal development training. Because she had already conducted a problem analysis herself, she seemed to have clear in mind what

she wanted to ask to Train&Co. It is an important moment in the customer's journey. The HR manager is on the verge of making a decision for a service provider, which makes it a 'moment of truth' for Train&Co. The SVE of the HR manager is at this moment fragile in the sense she can either be disappointed or satisfied with Train&Co's offering.

Michael (Train&Co's account manager) was overwhelmed by the amount the HR manager asked for. In his opinion the needs were so scattered which negatively influences the effectiveness of trainings. Also, the scope of the disciplines was too broad. Michael gave push back upon this and advised to start small and with a clear target group. He proposed an alternative offering which would probably better suit with the organisation of the customer.

The HR manager was happily surprised with the advice of the account manager.

"I remember when Michael told me: 'If you want all of this, you should look for another service provider. I'm not going to commit myself to this'. I really appreciated the honest feedback and I'm happy he gave me push back. My plans were too ambitious. Michael advised sincerely what was good for us and didn't act from a commercial point of view." [Customer – HR manager]

Through a combination of empathising in the customer's situation, the account manager was able to understand the deeper needs of the customer's organisation. Acting decisively through giving push back on the initial needs of the HR manager resulted in a happily surprised customer. The account manager carefully managed their relation through his customer-centric approach and tailoring its possible value offering.

*Illustration 5 (case 3.1) - The service provider tailors acts solution oriented, emphasises in the customer and manages the relation strategically the customer's choice and purchase phase*

The customer is about to make a choice for MonITor's solution. John, being the account manager, was the fixed contact person of the customer. He had intensive contact in the previous months with providing the customer with information and building a relation. John arranged a kick-off meeting with several stakeholders (interim manager, project leader and several IT architects) at the customer's organisation. It being a critical event in the CJ because John could not be present at the kick-off meeting for this current large-scale project. The customer's SVE is altered by the service provider.

Since John is on summer holiday, Bob (director of MonITor) temporarily replaced John to attend the meeting. Bob's goal was to show commitment from MonITor towards the customer and showing the priority they have to MonITor. However, in an in-depth interview with the project leader – a couple of weeks after the kick-off meeting – he pointed out that he was surprised by the action MonITor took by the fact that Bob showed up John's absence. He had an uncanny and sceptical feeling.

"You know, Bob showed up. Then something happens with me. John should have been here but Bob did. He introduced himself as the director of MonITor. Even though I know they are not a player like Microsoft... With everything he said, I questioned myself, should John have said that? That's really strange.

Sometimes during the presentation, I thought ‘Yes, it’s Bob’... We knew John already, he knows his topic and we already built a relation with him. And if Bob should attend more often such meetings, shouldn’t he be at least should be acquainted with the skills and knowledge John has? As a customer, it is part of your choosing process and if such a relatively minor factor determines whether to sign a contract or not, well that could count... John is going to tell what’s good for us and in that view, there is no room for someone else. I’m not sure whether my colleagues felt the same, but in my role in project leader it’s of utmost importance to monitor every decision. In terms of budget, planning and scope. Especially who are you talking to and what their roles are.... It is very important, and it depends per phase that we are in. During our selection is the account manager very important. Also during the contract phase. But at this moment, during the implementation phase is the consultant more important.” [Customer – project leader]

MonITor clearly did effort to maintain the SVE of the customer stable by showing commitment through personnel replacement when needed. It acted solution oriented. Employees from MonITor emphasised well in the customer by knowing that the kick-off meeting for a large trajectory is of utmost importance for the customer. They carefully managed their relation. Despite all their useful actions and efforts, uncoordinated SVE management by the account manager caused this critical event. Therefore, it was necessary for the MonITor to stabilise and repair the SVE of the project leader again.

*Illustration 6 (case 3.2) – The service provider solves problems ad hoc, acts solution oriented and manages expectations carefully in the customer’s choice and purchase phase*

A critical event arises because of unclarity in agreements between the customer and MonITor. It causes friction with an unsettled SVE as a result. During a meeting where a customer is about to sign a contract with MonITor, the project leader points out he did not know about agreements that were made with colleagues of him and MonITor. He asks surprisingly:

“Which agreements did you make with our developer”? [Customer – project leader].

The representative of MonITor acts upon this and responds immediately:

“Yesterday I got an email from your developer with several questions based on the answers I gave him in earlier email correspondence. We agreed that I will contact our development department and depending on how soon I get a response, I will give you follow-up. Based on this, I promise to send you the formal agreement before the end of next week.” [MonITor – director]

The project leader seems to be content with the outcome:

“Perfect. That’s sufficient for me because then I can set up and arrange internal issues. Super. Thanks very much and we will keep in touch then.” [Customer – project leader]

First of all, the critical event arose because of uncoordinated management by MonITor. As a response, the director of MonITor took immediate action and aligned internal departments of the customer with its own service desk. He promised a quick follow-up which safeguarded the SVE of the customer’s

project leader. Through having solved the problems ad hoc and still being solution oriented, the service provider carefully managed the customer's expectations and secure its SVE.

*Illustration 7 (case 4.1) – The service provider empathises in the customer and repairs the situation in the customer's implementation and usage phase*

In the current situation, the customer makes use of MonITor's offering which is in this case concerns an IT application. The critical event arises when during the usage phase, the customer points out that MonITor lacks proactive communication in terms of information provision in cases of breakdowns or about possibilities of offering.

"I'm not satisfied with the communication between us so far. Communication is of vital importance. So please, communicate. The more the better!" [Customer – IT manager]

MonITor acted too late the first time a minor breakdown occurred. With the second breakdown, the customer was first to get in touch. MonITor's account manager got head over heels in touch with internal support desk to fix the problem. This provided customer with a solution for the current case. However, in the future collaboration, he does not expect 'one-off solutions' but continuous more proactive communication from MonITor. The customer remains slightly sceptical.

This illustration shows that the service provider repaired the situation through acting according to the customer's wishes and aligning internal departments. Empathising in the customer's situation is of crucial importance. Despite the fact that the customer is provider with a solution and the SVE is stabilised, this critical event shows the fragility of SVE. It can be easily taken out of balance and takes effort to restore it. Also, the illustration demonstrates that the customer's future expectations might change.

*Illustration 8 (case 4.3) – The service provider solves problems ad hoc, acts solution oriented and decisively and empathises in the customer in the customer's implementation and usage phase*

The customer has been making use of the MonITor's offering for a couple of months. During an update meeting, the customer (head of back-office) points out that in cases of breakdowns, the current system does not provide insight into what goes wrong. This is critical for the customer because it directly impacts its internal processes. Despite the fact the error is quickly fixed, the customer looks for stability in his back-office processes which currently could be improved. This forms a critical event which both affects the customer's SVE as well as the relation with MonITor.

While demonstrating what is the case, the head of back-office points out:

"See... I am missing thresholds over here. In this dashboard, I need more information that thoroughly shows me what's going on. This is too superficial." [Customer – head of back-office]

MonITor's account manager first shows understanding in the customer's situation. He promises that MonITor's support desk will get in touch and they look collaboratively for possibilities in the system that creates additional insight for the customer. The account manager follows to explore for possible solutions at the customer's organisation and proposes to install dashboards on walls in the back-office. He mentions:

"I don't see any screens showing the dashboards. This is absolutely necessary because it shows you what's happening and what you need to do." [MonITor – account manager]

The customer understands the remark of MonITor's account manager. He looks happy and satisfied with the outcome of the meeting. At the end of the meeting, he shows understanding:

"I fully agree with what you just said. It comes only to life if there are screens present at my department. Everybody should be able to see what's happening." [Customer – head of back-office]

Clearly, the account manager's action showed that solving problems ad hoc is important for temporarily restoring the SVE. Acting solution oriented through showing immediate solutions helps the customer to solve its own problems. This directly contributes to an improved SVE. Moreover, through empathising in the customer and showing understanding, while at the same time being decisive, the customer seems to have confidence and trust in the service provider.

*Illustration 9 (case 4.4) – The service provider shows uncoordinated SVE management, responds slowly and shows avoiding behaviour in the customer's implementation and usage phase*

In this critical event, the customer experienced mismanagement in expectations from a service provider which in this case was a competitor of MonITor. The contract was already signed and the service provider was busy with implementation. The customer thought the offering was clear and the price was discussed in a previous stage. The service provider stated that there will be additional costs charged for several features of the offering.

The customer's project leader played a key role resolving these issues with the service provider's consultants and account manager. The project leader asked and demanded for clarity and information regarding the service provider's promise. The service provider acted firmly and stood its ground by stating the customer must pay additional costs for the features. When the customer asked questions regarding facts mentioned in the contract, the service provider was not able/willing to answer questions. The project leader points out:

"They kept on passing on our questions. They kept on ignoring the facts. It was like they acted like an ostrich, burying its head in the ground." [Customer – project leader]

The customer felt misled by the mismanagement in expectations by the service provider and the bad service. The customer reacted surprised:

“They have not been open to us regarding additional costs. For me, these are basic features that should be included in the offering. It’s like buying a car without wheels and the sales clerk tells you that you have to pay extra for them. You know, these extra costs are unknown and not reasonable. It’s like receiving a cold shower.” [Customer – project leader]

This illustration clearly shows uncoordinated SVE management which in this case is clearly shown by among other things mismanagement in expectations. The service provider responded slowly to the customer’s urgent questions, was stubborn and buried its head in the ground. They showed avoidance behaviour which caused the customer felt being lost. The SVE is destructed in such a way the customer looked for another service provider.

*Illustration 10 (case 5.2) – The service provider analyses the problem thoroughly, acts solution oriented and advises proactively the customer’s evaluation and follow-up phase*

Train&Co just finished a long trajectory with different types of trainings at a customer. Several groups of employees with different roles, responsibilities and backgrounds followed training sessions. Despite the fact the customer is satisfied with the trajectory, it always faces challenges how to safeguard the knowledge and skills the employees learned within the organisation and use it in daily practise. This moment in time is important for both parties. For the customer because it faces challenges in service safeguarding. For the provider since it affects the customer’s SVE when they are not able to safeguard it within the organisation, even though the actual training sessions are done. Moreover, this phase is a moment of truth for the service provider since they may excel in facilitating the customer with a solid SVE or even might offer a next project.

The account manager scheduled a meeting with five representatives of the HR department of the customer. He brought his colleague who is a trainer along to accompany him during the meeting. The agenda for the meeting only focused on how the organisation can safeguard what employees learned from the training sessions. The account manager prepared the meeting well with the trainer. They already exchanged a couple of ideas. During the meeting, it is clear that the account manager and the trainer are in the lead. They structure the meeting, starting with first asking questions about the current situation and more background information about the problems the organisation faces, followed by initiatives for improvement. They suggested for example to introduce ‘ten-minute talks’ with the trainer in the months after the trainings to embed the skills in the employees’ own work. Another example is set-up a ‘coach the coach’ trajectory in which managers are coached by the account manager and trainer. This helps managers to coach their own employees and stimulate to use the skills and knowledge they learned from the training.

It is clear the whole HR team is happy with the results. Expressions like ‘eye-opening’ regularly pop by. All representatives thank the account manager and trainer for their help. The highest HR manager



in class gives a last compliment to them and tells that she will try to convince the board that both the training sessions and the safeguarding process deserves C-level priority.

The account manager and trainer played a crucial role in exceeding expectations and strongly managing the customer's SVE. They analysed the problem thoroughly by conducting a careful root cause analysis of the customer's situation. Through acting solution oriented and proposing concrete and novel solutions, the customer is positively surprised and seem to have hope in overcoming their challenges. The account manager and trainer proactively advised the customer which accommodated to a solid SVE.

*Illustration 11 (case 5.3) – The service provider analyses the problem thoroughly, advises constructively, acts solution oriented but has a too opportunistic and insistent sales approach in the customer's evaluation and follow-up phase*

The customer, a cleaning services company, finished a long trajectory of training sessions. Several departments within the customer's organisations followed IT training during the last months. Still, it remains unclear for the L&D manager how the trajectory is evaluated by the employees and whether it fulfilled their needs. This moment in the customer's CJ forms a crucial event since it shows the satisfaction of employees on Train&Co's service and might bring along possibilities for future collaboration.

The account manager of Train&Co took action and sent out a survey to all employees to check how they evaluated the trajectory and the trainings they followed and whether they have any other needs regarding personal development. The results of the survey pointed out that there still seem to be a general need for furthering and deepening the skills of the employees on a specific IT application. The account manager scheduled a meeting with the L&D manager to discuss the results. He brought a long a report with the findings.

The L&D manager is impressed by the work the account manager has done. During the meeting, a discussion arose regarding the needs versus the possibilities at the customer's organisation. The L&D manager points out several times that internal processes cause delay and she faces budget and decision-making issues. The account manager from Train&Co continuously held upon his argument that employees need more training. He offers to create more in-depth insight on the current findings of the survey and the L&D manager responds with:

“No, that's not going to happen. We'll take care of that ourselves.” [Customer – L&D manager]

The account manager focused strongly on commercial opportunities which affects the L&D manager's mood and willingness to cooperate and collaborate with the account manager. This fashion of pushing through on sales, showing a too opportunistic and insistent sales approach, negatively affects the L&D manager's SVE. Despite the negative outcome, the L&D manager was initially positively surprised by the homework the account manager has done. He showed responsive behaviour through sending out the

survey, building his proactive advice upon the customer’s problem that he carefully analysed and remained solution oriented. This illustration depicts the critical act of carefully choosing what to do as a service provider because the customer’s SVE is easily affected.

**Patterns of facilitating service providers’ SVE management activities across the CJ**

Our analysis in the previous section shows we identified eleven activities service providers conduct in managing the customer’s SVE. Our focus lies on managing SVE and therefore only include actions that accommodate SVE. In this section, we show what patterns emerge when analysing the service provider’s activities carefully across the CJ. As illustrated in Figure 1, the five steps of the CJ are shown in the centre of the figure followed by three layers of activities. The activities are depicted in such a way that the closer they are positioned to the centre, the higher the priority in SVE management.

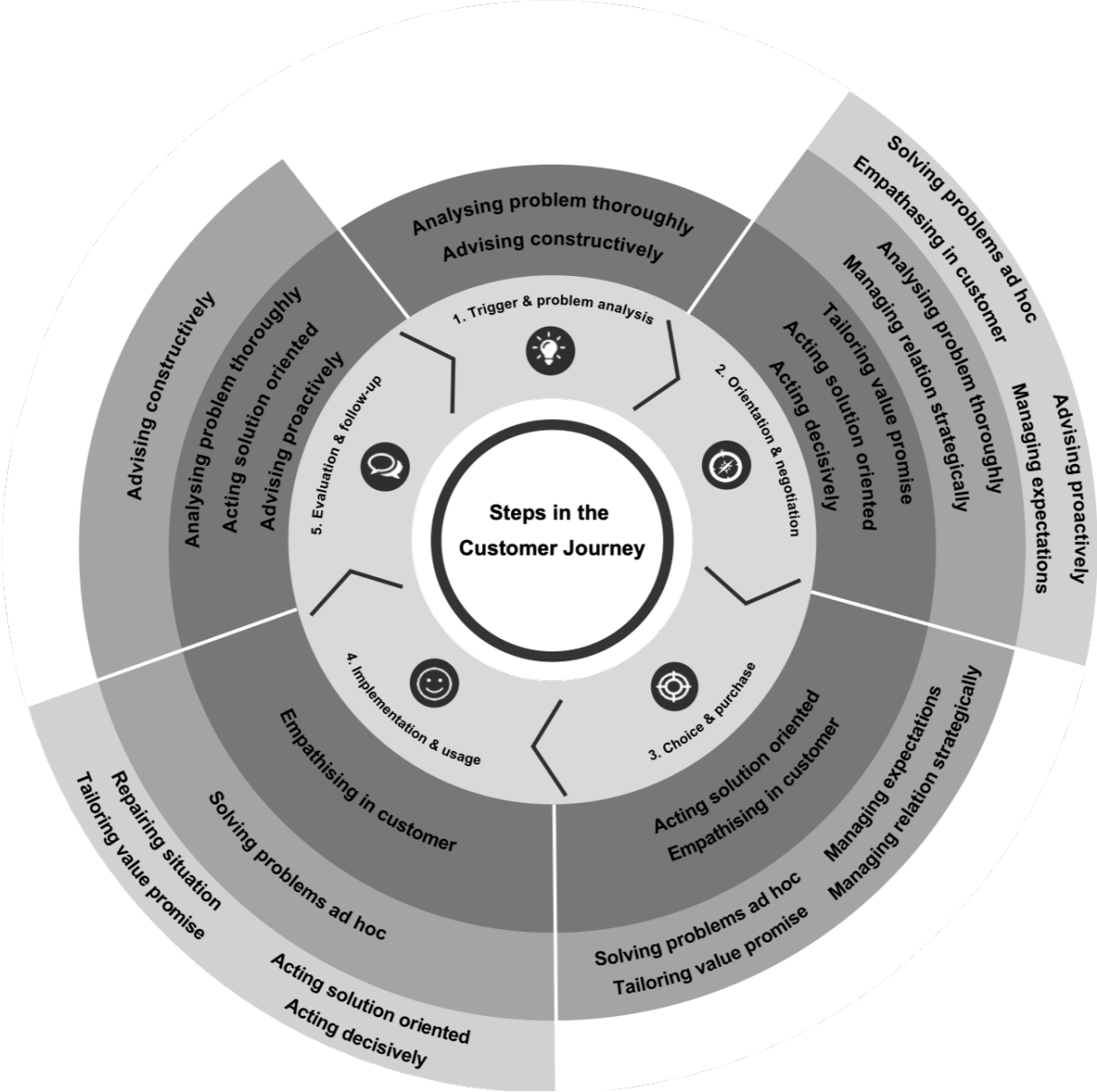


Figure 1 – Service provider activities in managing SVE throughout the CJ organised in a threefold priority (the closer to the centre, the more important the activity)

## **CONCLUDING REMARKS**

### **Summarising our findings**

The fact that service provider activities in SVE management throughout the CJ has so far been under investigated formed the impetus for our research. Our aim was to contribute to this gap through investigating through which activities service providers manage the customer's SVE throughout the CJ. We did so by conducting an intensive ethnographic case study at two service providers in knowledge intensive consulting and training services context. We carefully studied their actions in critical events where the customer's SVE was altered. Our findings show a total of eleven crucial service provider activities that facilitate the customer's SVE along the CJ. Each activity has dynamic presence in different phases of the CJ which we categorised in a threefold priority. We identify that in early prepurchase phases of the CJ (phase one, two and three) activities such as analysing the customer's problem thoroughly, providing advice constructively while acting decisively and solution-oriented are important contributors to the customer's SVE. Also, tailoring the firm's value promise is relevant to make the service provider's offering fit with the customer's needs and expectations. Moreover, showing empathy is crucial when customers look ahead to make a choice or purchase and other activities such as investing in a fruitful collaboration through strategic relation management. Typical in the actual usage phase of the CJ is that service providers are mainly occupied with creating customer empathy. Consequently, they act accordingly through for example solving problems ad hoc. In the final evaluation and follow-up phase, previous patterns return in the sense that service providers do exhaustive research into the customer's problem. Based on this, they provide advice proactively and act solution oriented. In our journey in bringing these to light, we also discovered four activities that are destructive towards SVE: managing SVE uncoordinatedly, communicating slowly, acting avoidantly and selling opportunistically and insistently.

### **Discussion and contributions**

With current literature showing the complexity of CJs (see for example Grönroos (2017); Lemon and Verhoef (2016); Norton and Pine (2013)) and the fact how service providers manage SVE across the CJ remains a blackbox (Ostrom et al., 2015), we expected a serious challenge to studying service provider activities on a micro level. What especially was remarkable in this is the changing character of service provider activities along the CJ. We have shown that these activities are present in different levels of presence and importance in the phases of the journey of customers. The changing character in service provider activities contributes – while at the same time confirms – the ongoing discussion in literature about how organisations should adapt to the complexity of the CJ (Lemon & Verhoef, 2016). Parallely, it agrees with scholars pointing out the different and complex dimensions of SVE (see Ellway and Dean (2016); Helkkula et al. (2012); Sahhar and Loohuis (2017); Schembri (2006); Yakhlef (2015)). Moreover, our findings render support to organisations finding it challenging to manage customer's

experience throughout the CJ (Edelman & Singer, 2015; Rawson et al., 2013). In our search for SVE management activities, we thought primarily about SVE facilitating activities. However, in our search for SVE management activities where we uncovered also SVE destructing activities, we have discovered the thin line between facilitative and destructive activities.

As to our theoretical contributions, we were to our knowledge first who did effort uncovering activities service providers conduct in managing and shaping the customer's SVE in the entire CJ. Second, by cross linking the CJ with these activities, we were able to create a temporal dimension to the service provider activities. This includes which activities are when in the CJ more relevant than others according to a threefold priority. Third, we show managing SVE is a critical act for service providers because of its fragile, dynamic and temporal nature.

### **Managerial implications**

Acting in accordance to understanding value related concepts from a micro level in order to make it managerially understandable (Grönroos, 2017; Grönroos & Voima, 2013), the preceding theoretical contributions touched upon a number of implications for practitioners. First, service managers can use the activities we identified as supporting drivers in facilitating customers with an enhanced SVE. Second, the SVE destructing activities might trigger service providers what to prevent in SVE management. Despite the fact this was not our primary focus, it is useful information for service providers aiming to facilitate a pleasant SVE for customers. Finally, through showing SVE's nature we wish to raise awareness amongst practitioners that SVE management is a challenging operation that needs careful management.

### **Avenues for future research**

Our research used a micro dynamic interpretive approach on how service providers manage the customer's SVE. We are convinced that this stance and our findings can serve as an impetus for other researchers to further investigate how such activities affect specific dimensions of SVE such as temporality (past, present, future) or collective versus individual SVE. Our point of departure was through which activities service providers manage the customer's SVE. Along the way, we also discovered activities that destruct SVE. We are convinced it is valuable to furthering our understanding of SVE destructing activities. Finally, we focus specifically on a knowledge intensive consulting and training service context. Our micro perspective of investigating SVE and our actual findings might be useful for other similar contexts. However, we stimulate colleague scholars to enhance our comprehension of other business contexts and also differentiate in B2B and B2C relations.

## APPENDIX

Table 2 - Data analysis for all cases

Steps in the Customer Journey	1. Trigger & problem analysis <i>(Customer is triggered by something and aims to create insight in what the problem is)</i>	2. Orientation & negotiation <i>(Customer orients to and negotiates possible solutions)</i>	3. Choice & purchase <i>(Customer makes a choice for a solution and purchases the solution)</i>	4. Implementation & usage <i>(Customer (possibly) implements the service provider's solution and makes use of it)</i>	5. Evaluation & follow-up <i>(Customer evaluates upon the service provider's service and solution and gives a (possible) follow-up)</i>
Case	Case 1.1	Case 2.1	Case 3.1	Case 4.1	Case 5.1
<b>Critical incident</b>	A first meeting between Train&Co and (potential) customer takes place. The account manager and trainer from Train&Co meets with an HR manager from the customer. They discuss the current situation at the customer's organisation and the challenges they face. It seems the HR manager has difficulties pinpointing exactly where the problem lies. In dialogue, the account manager and the trainer ask triggering questions to the HR manager to find out more about the situation.	Customer faces challenges how to overcome/pass internal bureaucratic procurement and legal processes. Service provider thinks along with customer how to accommodate customer through these processes. Moreover, he customer's organisation is complex and besides that lost trust in external consultancy providers because of a project that did not succeed in the past.	Customer is about to make a choice for MonITor's solution. John, being the account manager, was the fixed contact person of the customer. He had intensive contact in the previous months with providing the customer with information and building a relation. John arranged a kick-off meeting with several stakeholders (interim manager, project leader and several IT architects) at the customer's organisation. However, John could not be present at the kick-off meeting for this current large-scale project.	Customer makes use of service provider's offering (IT application). During usage, customer points out that service provider lacks proactive communication in terms of information provision in cases of breakdowns or about possibilities of offering.  <i>"I'm not satisfied with the communication between us so far. Communication is of vital importance. So please, communicate. The more the better!" [Customer – IT manager, p. 3]</i>	In the previous phase, the customer made use of service provider's offering. However, it is not clear for the customer what the possibilities are with the offering and how the service provider's solution facilitates the customer with value. Therefore, the implementation did not succeed.  <i>"When looking back at last months, I can say that Michael (consultant Service Provider) found a solution that only fits with Hassan's (IT employee) needs. It's like we bought a Ferrari and use it like we drive in a Deux Chevaux. As a result, the implementation didn't succeed so far. [Customer – IT manager, p. 7]</i>
<b>Action</b>	The trainer confronts the HR manager in a polite and correct way and follows with a possible solution: <i>"If I may confront you? ... It already struck me a bit. When the current situation tells me that if a citizen breaks the rules three times, that person apologises and only gets a warning, some things are not in place. I can imagine that you want to give people a second chance, for sure, but in the ideal situation your organisation should implement new policies and should be very consequent in following these policies. If a citizen breaks the rules, your employees should report the police. And I understand you cannot oblige your employees to make a report, but you as an HR department can take responsibility and do the</i>	At the face-to-face meeting, Evert (IT manager), Martin (account manager) and Kenneth (expert IT consultant) discuss and walk through all steps that should be taken in order to start as soon as possible. Martin turns complications into opportunities and proposes proactively that he is flexible to reach out to help. Expert consultant gives follow-up after meeting with action plan.	Since John is on summer holiday, Bob (director of MonITor) temporarily replaced John to attend the meeting. Bob's goal was to show commitment from MonITor towards the customer and showing the priority they have to MonITor.	Service provider acted too late the first time a minor breakdown occurred. With the second breakdown, the customer got in touch. MonITor's account manager (John) got directly in touch with internal support desk to fix the problem.	Service provider contacted customer to plan a meeting. The account manager (Martin) brought an IT expert consultant for advice specifically on the IT system and (possible) solution.

	<i>reporting yourself.” [Train&amp;Co – trainer, p. 23]</i>				
<b>Outcome</b>	<p>The customer comes to new insight about what exactly the problem is and how Train&amp;Co can help. <i>“That strikes me. I think you’re right regarding that. We have been discussing several issues internally with our legal department, but your idea is new to us. It often happens that our employees are directly affected by the incident and they do not want to report to the police. So far, we thought, one way or the other, the employee is responsible for this. Acting upon the incident, that is the current difficulty and the point of discussion yes...” [Customer – HR manager, p. xx]</i></p>	<p>IT manager is satisfied that action is being taken and MonITor helps him out with his problems.</p>	<p>In an in-depth interview with the project leader – a couple of weeks after the kick-off meeting – he pointed out that he was surprised that Bob showed up in John’s absence. He had an uncanny and sceptical feeling.</p> <p><i>“You know, Bob showed up. Then something happens with me. John should have been here but Bob did. He introduced himself as the director of MonITor. Even though I know they are not a player like Microsoft... With everything he said, I questioned myself, should John have said that? That’s really strange. Sometimes during the presentation, I thought ‘Yes, it’s Bob’... We knew John already, he knows his topic and we already built a relation with him. And if Bob should attend more often such meetings, shouldn’t he be at least should be acquainted with the skills and knowledge John has? As a customer, it is part of your choosing process and if such a relatively minor factor determines whether to sign a contract or not, well that could count... John is going to tell what’s good for us and in that view, there no room for someone else. I’m not sure whether my colleagues felt the same, but in my role in project leader it’s of utmost importance to monitor every decision. Especially who are you talking to and what their roles are.... It is very important, and it depends per phase that we are in. During our selection is the account manager very important. Also during the contract phase. But at this moment, during the implementation phase is the consultant more important.” [Customer – project leader, p. 22 &amp; 41]</i></p>	<p>Customer is provided with a solution for the current case. However, in the future collaboration, he does not expect ‘one-off solutions’ but continuous more proactive communication from MonITor. The customer remains slightly sceptical.</p>	<p>MonITor provided the customer clarity. It is clear for the customer what to expect for the coming weeks both in terms of project planning and content.</p>
<b>First order service provider activities</b>	<ul style="list-style-type: none"> <li>• Creating insight in current situation through critical questions</li> <li>• Helping customer to create insight in problem/challenges</li> <li>• Providing constructive feedback</li> </ul>	<ul style="list-style-type: none"> <li>• Turning complications into opportunities</li> <li>• Proactive help</li> <li>• Relieving customer from its duty</li> <li>• Ad hoc future problem solving</li> </ul>	<ul style="list-style-type: none"> <li>• Showing commitment</li> <li>• Provide personnel replacement</li> </ul>	<ul style="list-style-type: none"> <li>• Showing empathy in customer’s problem</li> <li>• Making future promises</li> <li>• Ad hoc repair work</li> </ul>	<ul style="list-style-type: none"> <li>• Proactive action</li> <li>• Sharing knowledge</li> <li>• Tailored advice</li> <li>• Creating certainty</li> <li>• Providing structure</li> </ul>

	<ul style="list-style-type: none"> <li>Providing constructive advice</li> </ul>	<ul style="list-style-type: none"> <li>Creating certainty</li> <li>Providing structure</li> </ul>			
<b>Second order service provider activities</b>	<b>3. Analysing problem thoroughly</b> <b>4. Advising constructively</b>	<b>1. Solving problems ad hoc</b> <b>6. Acting solution oriented</b>	<b>6. Acting solution oriented</b> <b>8. Empathising in customer</b> <b>11. Managing relation strategically</b>  <b>A. Managing SVE uncoordinated</b>	<b>2. Repairing situation</b> <b>8. Empathising in customer</b>	<b>9. Advising proactively</b>
<b>Case</b>	<b>Case 1.2</b>	<b>Case 2.2</b>	<b>Case 3.2</b>	<b>Case 4.2</b>	<b>Case 5.2</b>
<b>Critical incident</b>	<p>The Learning &amp; Development (L&amp;D) representative of the customer points out they experience quite some resistance within the organisations towards receiving training on several topics. This withholds Train&amp;Co to gain access to the customer's organisations and sell its offering.</p>	<p>Customer has been triggered through an error in a software mailing system. Hans (Interim IT manager) is responsible for making IT department run smooth again. Despite he knows what his needs are, he experienced problems in finding a system that did not intervene with currently running systems.</p> <p><i>"I knew what I wanted. The system should be fit for future, within budget, no SAP and our organisation's performance should be monitored. John immediately had a suitable solution for this and we could collaboratively make next steps."</i>  <i>[Customer – Interim IT manager, p.5]</i></p>	<p>There is unclarity in agreements between the customer and the MonITor. During a meeting where a customer is about to sign a contract with MonITor, the project leader points out he did not know about agreements that were made with colleagues of him and MonITor. He asks surprisingly: <i>"Which agreements did you make with our developer?"</i>  <i>[Customer – project leader, p.22].</i></p>	<p>The customer has difficulties at the IT department. It seems that the service provider's tool is one of the systems that cannot be successfully implemented. Currently, there is already one consultant present at the customer's IT department to lead the implementation. However, things are not going according to plan in the sense that it does not contribute to the IT manager's goals (namely: continuity, stability and accessibility at the data centre).</p> <p>During an update meeting between the customer and the service provider's account manager and expert consultant, the customer states: <i>"Not to blame someone personally but Michael has been present here for quite some time now. He is part of the organisation. In order to comply with proactive preventive management, I need administrators, not people that only put out fire. ... I need someone with a lot of experience with tools. It doesn't matter if we make mistakes. But ok, what's next? I want preventive monitoring management."</i>  <i>[Customer – IT manager, p. 7]</i></p>	<p>Train&amp;Co just finished a long trajectory with different types of trainings at a customer. Several groups of employees with different roles, responsibilities and backgrounds followed training sessions. Despite the fact the customer is satisfied with the trajectory, it always faces challenges how to safeguard the knowledge and skills the employees learned within the organisation and use it in daily practise.</p>
<b>Action</b>	<p>The account manager asks questions to elicit information where exactly the resistance comes from.</p> <p><i>"The dynamics within groups are so different. Some people find it hard to practise situations within a training or others find it confronting. How people perceive such training sessions are very important. I think this is where the resistance comes from."</i>  <i>[Customer – L&amp;D manager, p. 25]</i></p>	<p>Account manager (John) provides suitable offering that perfectly suited with interim IT manager's needs.</p>	<p>MonITor acts upon this and responds immediately: <i>"Yesterday I got an email from your developer with several questions based on the answers I gave him in earlier email correspondence. We agreed that I will contact our development department and depending on how soon I get a response, I will give you follow-up. Based on this, I promise to send you the formal agreement before the end</i></p>	<p>In consultation with the customer, MonITor put forward an extra consultant to another consultant to solve the problem and support the current IT team.</p>	<p>The account manager scheduled a meeting with five representatives of the HR department of the customer. He brought his colleague, a trainer, along to accompany him during the meeting. The agenda for the meeting only focused on how the organisation can safeguard what employees learned from the training sessions.</p> <p>The account manager prepared the meeting well with the trainer. They already exchanged a couple of ideas.</p>

	<p>The account manager responds and involves the knowledge and expertise of the trainer that is present. The trainer responds: <i>“Without being arrogant, from my experience I can say I cannot take this resistance that is present. It always is present, especially before attending the training session. The only thing that I can say is that our approach to training is different than others. Usually, talking about training sessions, people think of classic role playing. Of course, people hate this. They are picked, one by one, from the group to practise a conversation with an actor acting like an angry customer. In the first ten minutes, one way or the other, you’ll have a hard time and you’ll be cut up. Just obviously, just after, the actor gives the participants a success experience to compromise it a bit. Yes, that is terrible... We follow a different approach which we also communicate towards participants in advance. Our training sessions are much more practical and evolves naturally.”</i> [Train&amp;Co – trainer, p. 26]</p>		<p><i>of next week.”</i> [MonITor – director, p.22]</p>		<p>During the meeting, it is clear that the account manager and the trainer are in the lead. They structure the meeting, starting with first asking questions about the current situation and more background information about the problems the organisation faces, followed by initiatives for improvement. They suggested for example to introduce ‘ten-minute talks’ with the trainer in the months after the trainings to embed the skills in the employees’ own work. Another example is set-up a ‘coach the coach’ trajectory in which managers are coached by the account manager and trainer. This helps managers to coach their own employees and stimulate to use the skills and knowledge they learned from the training.</p>
<b>Outcome</b>	<p>The customer’s previous experience with training sessions is tempered by Train&amp;Co. The HR manager sees merit in Train&amp;Co’s approach: <i>“The last years we collaborated with another party. At some point I reckoned that people were fed up with these training sessions. And yes, your approach is significantly refreshing compared to others. Especially your practical approach and customisation towards our needs suits me well.”</i> [Customer – L&amp;D manager, p. 26]</p>	<p>Instantly a kick-off presentation with management team has been planned and organised to set up pilot phase. Hans is happy with steps taken.</p> <p><i>“Through planning this meeting, it becomes priority of the entire organisation... John knows exactly what I am looking for and meet my needs in a very pragmatic fashion.”</i> [Customer – Interim IT manager, p. 6]</p>	<p>The project leader seems to be content with the outcome: <i>“Perfect. That’s sufficient for me because then I can set up and arrange internal issues. Super. Thanks very much and we will keep in touch then.”</i> [Customer – project leader, p. 23]</p>	<p>The customer’s IT manager is content with the decision to put forward another consultant with a fresh view. MonITor restored trust and took away the IT manager’s anxiety for not succeeding.</p>	<p>It is clear the whole HR team is happy with the results. Expressions like “eye-opening” regularly pop by. All representatives thank the account manager and trainer for their help. The highest HR manager in class gives a last compliment to them and tells that she will try to convince the board that both the training sessions and the safeguarding process deserves C-level priority.</p>
<b>First order service provider activities</b>	<ul style="list-style-type: none"> <li>• Root cause analysis</li> <li>• Showing knowledge &amp; expertise</li> <li>• Communicating unique elements of value promise</li> </ul>	<ul style="list-style-type: none"> <li>• Helping customer with own organisational challenges</li> <li>• Customise a compelling offering that fits with customer’s needs</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate action</li> <li>• Aligning/tuning with internal departments to solve problems</li> <li>• Quick follow-up</li> </ul>	<ul style="list-style-type: none"> <li>• Co-solving ad-hoc problem solving</li> <li>• Showing empathy in customer’s problem</li> <li>• Customer’s goal-based problem solving</li> <li>• Providing additional assets</li> </ul>	<ul style="list-style-type: none"> <li>• Root cause analysis</li> <li>• Sharing knowledge &amp; expertise</li> <li>• Proposing possible novel solution</li> <li>• Coaching customer in organisational challenge</li> </ul>



Second order service provider activities	3. Analysing problem thoroughly 4. Tailoring value promise	5. Tailoring value promise 7. Empathising in customer	1. Solving problems ad hoc 6. Acting solution oriented 10. Managing expectation	1. Solving problems ad hoc 5. Tailoring value promise 8. Empathising in customer	3. Analysing problem thoroughly 6. Acting solution oriented 9. Advising proactively
Case		<b>Case 2.3</b>	<b>Case 3.3</b>	<b>Case 4.3</b>	<b>Case 5.3</b>
Critical incident		While the customer orients and explores possibilities, the project leader investigated at other organisations how they experienced the service of MonITor. Out of eleven respondents, he all got the same answer. Every other organisation that has experience with MonITor as service provider was positive. Out of all parties, two parties pointed out that they experienced a critical moment when MonITor changed personnel because one of their consultants found a job elsewhere. The consultant was already involved during the whole trajectory and built trust at the customer.	Personal development representative pointed out that the L&D department often faces internal challenges such as convincing people for following training because it is relevant for their personal development as well as the development of the organisation. Often, people see training as a must. A final meeting takes place for on which the personal development representative makes her choice which service provider will take care of the training sessions for the coming year.	The customer has been making use of the MonITor's offering for a couple of months. During an update meeting, the customer (head of back-office) points out that in cases of breakdowns, the current system does not provide insight into what goes wrong. Despite the fact the error is quickly fixed, the customer looks for stability in his back-office processes which currently could be improved.  While demonstrating what is the case, the head of back-office points out: <i>"See... I am missing thresholds over here. In this dashboard, I need more information that thoroughly shows me what's going on. This is too superficial."</i> [Customer – Head of back-office, p. 9]	The customer finished a long trajectory of training sessions. Several departments within the customer's organisations followed IT training during the last months. Still, it remains unclear for the L&D manager how the trajectory is evaluated by the employees and whether it fulfilled their needs.
Action		MonITor acted upon this when it was known that the consultant left. In the meantime, the consultant who was familiar at the customer, introduced his colleague to give a 'warm handover' to the customer.	The account manager chose to bring along a trainer with a lot of experience for the meeting. During the meeting, the trainer was able to show a lot of expertise, but more importantly a wave of enthusiasm.	MonITor's account manager first shows understanding in the customer's situation. He promises that MonITor's support desk will get in touch and look collaboratively for possibilities in the system that creates additional insight for the customer. The account manager follows to look for possible solutions at the customer's organisation and proposes to install dashboards on walls in the back-office. He mentions: <i>"I don't see any screens showing the dashboards. This is absolutely necessary because it shows you what's happening and what you need to do."</i> [MonITor – Account manager, p. 10]	The account manager of Train&Co sent out a survey to all employees to check how they evaluate the trajectory and the trainings they followed and whether they have any other needs regarding personal development. The results of the survey pointed out that there still seem to be a general need for furthering and deepening the skills of the employees on a specific IT application. The account manager scheduled a meeting with the L&D manager to discuss the results. He brought a long a report with the findings.  The L&D manager is impressed by the work the account manager has done. During the meeting, a discussion arose regarding the needs versus the possibilities at the customer's organisation. The L&D manager points out several times that internal processes cause delay and she faces budget and decision-making issues. The account manager

					from MonITor continuously held upon his argument that employees need more training. He offers to create more in-depth insight on the current findings of the survey and the L&D manager responds with: <i>"No, that's not going to happen. We'll take care of that ourselves."</i> [Customer – L&D manager, p. 45]
<b>Outcome</b>		The customer was happy to be introduced to the new consultant by the previous one. It created trust and the customer was happy MonITor immediately took action and arranged everything in an orderly manner.	First, the personal development representative is positively surprised by the professionalism MonITor showed. Second, more important, the enthusiasm the trainer brought along during the meeting positively overwhelmed the customer. It exceeds the expectations of the customer.  <i>"The account manager and trainer did a great job. First, they advised me really well about what is suitable for our organisation and they did a nice offering in terms of training sessions with relatively low costs. Second, and more importantly for me, because of this stigma in the organisation that personal training is boring and the fact that people are sceptical, the trainer showed so much enthusiasm that I'm fully convinced my people will like it."</i> [Customer – Personal development representative, p. 44]	Customer looks happy and satisfied with the outcome of the meeting. At the end of the meeting, he shows understanding of the account manager's remark: <i>"I fully agree with what you just said. It comes only to life if there are screens present at my department. Everybody should be able to see what's happening."</i> [Customer – Head of back-office, p. 10]	The account manager seems to focus on commercial opportunities which affects the L&D manager's mood and willingness to cooperate and collaborate with the account manager.
<b>First order service provider activities</b>		<ul style="list-style-type: none"> <li>• Responsive behaviour by immediate action</li> <li>• Aiming to create trust through warm handover in personnel change</li> <li>• Careful relation management</li> </ul>	<ul style="list-style-type: none"> <li>• Professional enthusiasm</li> <li>• Strategic choice of own personnel</li> <li>• Communicating surprising/convincing value promise</li> <li>• Breaking internal stigma at customer</li> </ul>	<ul style="list-style-type: none"> <li>• Resolute behaviour</li> <li>• Resolving power</li> <li>• Customer's goal-based problem solving</li> <li>• Understanding/empathy in customer's situation</li> </ul>	<ul style="list-style-type: none"> <li>• Identify needs of employees' needs as opportunity for sales</li> <li>• Responsive action</li> <li>• Provide information</li> <li>• Pushing through on sales</li> <li>• Being slightly too opportunistic</li> </ul>
<b>Second order service provider activities</b>		<b>6. Acting solution oriented</b> <b>11. Managing relation strategically</b>	<b>5. Tailoring value promise</b> <b>8. Empathising in customer</b>	<b>1. Solving problems ad hoc</b> <b>6. Acting solution oriented</b> <b>7. Acting decisively</b> <b>8. Empathising in customer</b>	<b>3. Analysing problem thoroughly</b> <b>4. Advising constructively</b> <b>6. Acting solution oriented</b>  <b>D. Selling opportunistically and insistently</b>
<b>Case</b>		<b>Case 2.4</b>		<b>Case 4.4</b>	

<p><b>Critical incident</b></p>		<p>The L&amp;D manager at the customer points out they created insight into training needs of employees. The two departments that are scheduled to follow a training differ in needs. The employees of one department want a maximum of one day training and the other just half a day. The L&amp;D manager points out the employees are training averse.</p>		<p>The customer experienced a mismanagement in expectations from a service provider. The contract was already signed, and the service provider was busy with implementation. The customer thought the offering was clear and the price was discussed in a previous stage. The service provider stated that there will be additional costs charged for several features of the offering.</p>	
<p><b>Action</b></p>		<p>During the meeting, especially the account manager gives first of all pushback on the needs of the employees followed by questions to understand the situation. <i>“Only half a day?! That’s very short, too brief and something I would not recommend. It’s more like a workshop instead of a real training. But tell me, what exactly is the reason they only want a maximum of one day and half a day of training?” [Train&amp;Co – account manager, p. 40]</i></p> <p>The L&amp;D manager points out: <i>“I think it has to do a lot with previous experience. I get your point and it doesn’t mean that it counts for every single employee, but it is what we found on average. I know this organisation quite well, and I know that more than one day of training, no.... It sounds cliché but that is impossible with work.” [Customer – L&amp;D manager, p.41]</i></p> <p>The trainer joins the discussion and gives pushback in combination with advice: <i>“Look, in one day you can schedule quite a complete training. I’m able to discuss general theories and concepts. However, in half a day, that’s impossible. Half a day is more like a workshop to give people an idea what the training is about. If you choose for half a day, I advise to involve another half a day to explain the methodology and give some practical exercises to better embed the knowledge in people’s minds and to bridge the theory to practice. This</i></p>		<p>The customer’s project leader played a key role resolving these issues with the service provider’s consultants and account manager. The project leader asked and demanded for clarity and information regarding the service provider’s promise. The service provider acted firmly and stood its ground by stating the customer needs to pay additional costs for the features. When the customer asked questions regarding facts mentioned in the contract, the service provider was not able/willing to answer questions.</p> <p><i>“They kept on passing on our questions. They kept on ignoring the facts. It was like they acted like an ostrich, burying its head in the ground.” [Customer – project leader, p.27]</i></p>	

		<i>is simply not possible in half a day. And of course, if you insist on your initial ideas, be my guest but I strongly discourage you because it is not effective.” [Train&amp;Co – trainer, p. 41]</i>		
<b>Outcome</b>		<p>The L&amp;D manager seems to be convinced about the point the account manager and trainer make. She takes her ideas into account and points out a next hurdle is to convince other internal stakeholders.</p> <p><i>“I get your point and my proposition is that I will get in touch with the manager of both departments to point exactly out what you mentioned. So I’m going to check what they are capable of. You know, my opinion is, if you already book half a day, it makes absolutely sense to just book the whole day.... One of the managers have great affinity with such topics, so I don’t worry about her. To convince the other is a bigger challenge but we will see. I’ll contact them next week, and I’ll come back to you ASAP. As you suggested, you can then send me a proposal planning.” [Customer – L&amp;D manager, p. 42]</i></p>		<p>The customer was felt misled by the mismanagement in expectations by the service provider and the bad service. The customer reacted surprised: <i>“They have not been open to us regarding additional costs. For me, these are basic features that should be included in the offering. It’s like buying a car without wheels and the sales clerk tells you that you have to pay extra for them. You know, these extra costs are unknown and not reasonable. It’s like receiving a cold shower.” [Customer – project leader, p.27]</i></p>
<b>First order service provider activities</b>		<ul style="list-style-type: none"> <li>• Resolute behaviour: giving pushback on customer’s wishes.</li> <li>• Realistic &amp; adequate advice</li> <li>• Understand underlying needs of customer</li> <li>• Co-thinking in overcoming internal challenges</li> </ul>		<ul style="list-style-type: none"> <li>• No clear management of the customer’s experience</li> <li>• Stubbornly sticking to your ground</li> <li>• Unable to answer questions</li> <li>• Slow responses to customer’s urgent questions</li> </ul>
<b>Second order service provider activities</b>		<p><b>3. Analysing problem thoroughly</b>  <b>7. Acting decisively</b>  <b>9. Advising proactively</b>  <b>10. Managing expectation</b></p>		<p><b>A. Managing SVE uncoordinated</b>  <b>B. Communicating slowly</b>  <b>C. Acting avoidantly</b></p>
<b>Case</b>		<b>Case 2.5</b>		
<b>Critical incident</b>		The training coordinator of a customer’s L&D department was responsible for finding a suitable provider. Because a previous colleague already gave high priority to training employees, the training coordinator was more or less obliged		

		to give follow-up upon this. She pointed out she faced difficulties in making choices what types of training are suitable because she does not have a background in learning and development.			
<b>Action</b>		During the meeting, the account manager helps her in identifying needs. He helps to create insight in possible challenges the organisation faces as a whole and how individual training sessions may contribute to overcoming these challenges. On the spot, he proposes a handful types of training sessions that might be suitable for the target groups.			
<b>Outcome</b>		<p>The training coordinator is helped with the advice of the account manager. Because she is the vocal point for her colleagues for training sessions (including advising what type of training sessions are suitable for every individual employee), she feels supported by the knowledge and expertise of the account manager.</p> <p><i>"For me it is of crucial importance that I get some information and advice of a service provider. Michael helps me with this very well. He knows where the sweet spot lies for the type of training sessions for every department." [Customer – training coordinator, p. 44]</i></p>			
<b>First order service provider activities</b>		<ul style="list-style-type: none"> <li>• Identify customer's needs</li> <li>• Align offering with wish of customer</li> <li>• Proposing customer's goal-based offering</li> </ul>			
<b>Second order service provider activities</b>		<p><b>3. Analysing problem thoroughly</b>  <b>5. Tailoring value promise</b>  <b>6. Acting solution oriented</b></p>			
<b>Case</b>		<b>Case 2.6</b>			
<b>Critical incident</b>		HR manager of the customer is responsible for development of their employees on a strategical, tactical and operational level. With orienting			

		towards suppliers, she selected two service providers to further discuss possibilities. Because she had already done a problem analysis herself, she seemed to have clear in mind what she wanted to ask to Train&Co			
<b>Action</b>		Train&Co's account manager was overwhelmed by the amount the HR manager asked for. In the opinion of the account manager, the needs were so scattered which negatively influenced the effectiveness of trainings. Also, the scope of the disciplines was very broad. The account manager gave push back upon this and advised to start small and with a clear target group.			
<b>Outcome</b>		The HR manager was happily surprised with the advice of the account manager. <i>"I remember when Michael told me: 'If you want all of this, you should look for another service provider. I'm not going to commit myself to this'. I really appreciated the honest feedback and I'm happy he gave me push back. My plans were too ambitious. Michael advised sincerely what was good for us and didn't act from a commercial point of view."</i> [Customer – HR manager, p. 44]			
<b>First order service provider activities</b>		<ul style="list-style-type: none"> <li>• Push-back on customer needs</li> <li>• Tailored advice</li> <li>• Acting in the customer's interest, instead of own</li> </ul>			
<b>Second order service provider activities</b>		<b>5. Tailoring value promise</b> <b>7. Acting decisively</b> <b>8. Empathising in customer</b> <b>11. Managing relation strategically</b>			

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