



POINT OF VIEW:

# How to Prioritise CX Initiatives

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The expansive nature of customer experience (CX) programmes can lead to large wishlists with dozens (and sometimes hundreds) of requirements, initiatives, and change requests.

It'd be handy if time was an infinite resource, but pending the invention of a time machine, CX practitioners can only fit so many experience improvement initiatives on their plate at once. So, how do they pick what to focus on?

Brands can efficiently develop a CX roadmap by following these four steps:

- 1. Turn your brand vision into a CX charter**
- 2. Map and audit your high-level customer journey**
- 3. Identify gaps and initiatives across your customer journey**
- 4. Prioritise CX initiatives**

## STEP 1: CREATE A CX CHARTER

A brand is shorthand for the customer experience it delivers, so it's critical for CX practitioners to turn their brand's vision into a CX charter.

A CX charter is typically a set of aspirational statements that articulate an organisation's high-level experience. This charter should not be distributed externally—it's an internal set of principles that are designed to help evaluate decisions and, ultimately, to live by.

The most effective CX charters incorporate an organisation's high-level customer journey. For some brands, this translates into clear external indicators of what it will and will not do for both its customers and its employees.

For example, one target CX statement for "Getting Help" from a global telecommunications business read: "If you do wish to speak to us, there's no complicated menu, we won't keep you waiting for long and you'll speak to someone who is knowledgeable, friendly and able to resolve your query." This short, simple approach defines the target experience and makes it easy to identify gaps and measure improvement efforts.



## STEP 2: MAP & AUDIT YOUR CUSTOMER JOURNEY

Customer journeys are typically divided into two levels. A level 1 customer journey consists of the high-up steps of a brand's customer experience—examples of these steps include “Find and Buy”, “Get Started” and “Get Help.” A level 2 customer journey unpacks more detailed touchpoints, such as “I want to find the status of my order” or “I forgot to pay.”

A typical audit uses second-level customer journey touchpoints to ask two questions at each touchpoint: current experience (typically ranked as unacceptable, inconsistent, good, better, or best), and importance (typically ranked as insignificant, minor, moderate, major, or critical).

A gap analysis makes it easier for CX practitioners to isolate their touchpoints. Practitioners should refrain from managing more than around 10 touchpoints at a time, though they should switch their focus up as the brand's needs demand.

## STEP 3: IDENTIFY JOURNEY INITIATIVES

CX practitioners can use their priority touchpoints to close a brand's intelligence gaps. They should begin this process by creating high-level problem statements, then break those down into smaller, solvable business issues. Rendering problems in this way makes it easier to provide improvement opportunities.

This process also makes it easy to decide how many resources a problem needs in order to be fixed. Using this system, practitioners can more easily determine whether a business issue requires a small initiative (a few days' work and minimal resources) or a large project (multi-department work, many months of time, and other demands). Once practitioners have identified the nature and scale of a brand's problems, those issues can be integrated into a company's CX roadmap.

## STEP 4: PRIORITISE CX INITIATIVES

Companies will face an inevitable mix of “fix” (get the basics right) and “grow” (differentiate) initiatives. While fixing problems is certainly important, truly successful CX prioritisation means maintaining a ‘balanced diet’ of problem fixes and competitive improvements. This approach also makes it easier for practitioners to demonstrate ROI.

The truth is that companies cannot (and should not) focus all of their roadmap on fixing problems alone. If all a company does is fix what’s wrong, the most it can aspire to be is just okay. To achieve transformational success, companies should also shuttle CX resources toward amplifying what they do well, enabling them to enhance their competitive edge.

## PRIORITISATION, ACTION, ROI, REPEAT

All told, CX prioritisation makes its home at the crossroads of company vision, touchpoint comprehension, experience strategy, and stakeholder/resource management. CX practitioners who understand these elements will have a far easier time prioritising their projects. They can then take action, demonstrate ROI, and repeat this cycle in a manner that benefits both their organisation and its customers.

