



CUSTOMER EXPERIENCE STRATEGY

# How to Plot a Sustainable Path to Customer Centricity

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# Introduction

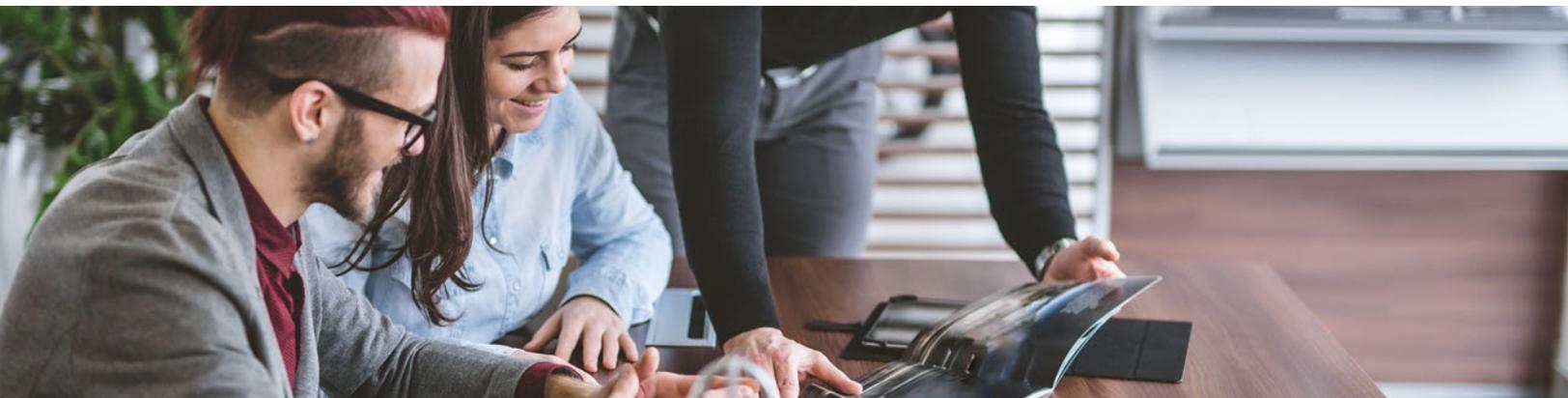
Building a customer experience (CX) strategy is much like building a home, whether you're starting from scratch or turning a fixer-upper into your dream home. While initially, you might not have the budget or know-how to construct your ultimate home or do a full rip-and-replace remodel, you can begin by knocking down walls, replacing outdated shag carpet, or revamping the kitchen: incremental progress that nets real results. And while the entire process might take months or even years to complete, having a strategic vision for the end result—and the proper materials to get there—is what truly matters.

Just like a new home, building a CX strategy is a multifaceted, multiphase, and often hugely complex undertaking.

Over the past 15 years—across all industries and geographies—we've been asked one question more than any other:

What are best-in-class brands doing when it comes to customer experience? Further, our clients want to know how and where to begin.

Crafting a CX strategy requires much more foresight, planning, and effort than simply selecting a CX intelligence platform and putting a customer listening program in place. In fact, when companies rely on technology alone, they limit their success and hamper their ability to become a world-class, customer-centric company. Regardless of what you call your customer listening efforts—Voice of Customer, customer feedback management, customer experience management, or something else—the insights derived from listening are the essential fuel that powers a larger CX vision. And every CX vision must be based on a comprehensive strategy that includes distinct components.





An effective CX strategy brings all of the required components together under a unified purpose that informs every decision a company makes. Becoming a customer-centric organization is a multi-stage, cross-functional undertaking that takes time, commitment, and fervent passion. It melds people, processes, culture, technology, analysis, tracking, and action. Only a handful of brands have achieved this level of CX nirvana—and they've all faced challenges along the way.

Consider this guide a blueprint for an ideal CX strategy, whether it's a renovation, remodel, or a completely new build. Remember, every business has its

own unique challenges and hurdles to overcome; however, they should not be viewed as deterrents, but as an invitation to rethink and ultimately shape your company's promise to your customers, employees, and all stakeholders. In fact, throughout this guide you'll find helpful examples from companies that have excelled in various areas of CX strategy.

From first steps to long-term goals, the following are the pillars—the foundation—of a successful CX strategy.

# CX-Centric DNA

***Becoming customer-centric doesn't just happen. It begins with a vision which, over time, becomes a fully-immersive reason for and way of doing business. It's more than an initiative—it's a business discipline—a way of life within a brand.***

***Here are five key areas that serve as building blocks for infusing customer centricity into your brand.***

## **VISION**

A vision is not simply a mission statement; it should specifically tie to your brand's promise and guiding values. A vision is an

omnipresent, clearly-defined force that is communicated to and fully understood by employees and is understood—and expected—by customers. Due to this transparency, the company is held accountable for the shared vision by both internal and external stakeholders. When you have a clear vision, you're more likely to follow through, and more importantly, you're motivated to improve.

## **EXECUTIVE COMMITMENT**

In an ideal world, customer-centric culture and business practices begin at the top, with the CEO driving the focus. In fact, researchers and analysts believe that if the CEO is not leading the CX conversation, then a company will never become a CX leader and reap the related benefits. In the real world, that kind of commitment is rare, especially when revenues dip, competition surges, and shareholders moan. While challenging, it is the explicit role of CX professionals to build a compelling business case that aligns with and supports executive goals. Only when the board and C-suite see the undeniable connection between CX success and bottom line results will this essential support follow.



## PEOPLE

Once you define your vision, it must be infused across hiring, training, coaching, and professional development to build and nurture a customer-centric culture for the long run. Your vision should help define the specific behaviors and traits of employees required to deliver on the brand promise. For many companies, this means shifting their requirements in the type of people they hire. Moving from a skill-based to a personality-fit mindset allows you to hire within the scope of the company's CX vision. It's a lot easier to train employees on specific skills (e.g., stocking shelves or operating a cash register) than on becoming customer centric (although, the latter can certainly be done).

## ENVIRONMENT

Maintaining a customer-centered company over time takes a comprehensive commitment, and incentives that match those objectives. Find ways to recognize people for upholding the brand's promise and reward those who continually strive to improve the customer experience (e.g., spearheading initiatives and offering recommendations). However, it also means truly valuing—beyond just lip service—employees as critical partners in creating and delivering a meaningful customer experience. Design KPIs, communication, and recognition programs to reinforce the message that you both hear and heed employee contributions.

## COMMUNICATION

A vision is only as good as the effectiveness through which it's communicated throughout the organization, and to the world. Craft a vision, declare it internally, then broadcast it externally.

- **Internal:** Ongoing and proactive communication regarding expectations, challenges, and successes is imperative. It's simply not enough to state your vision and then let it fade. Companies fail in CX when it's a one-time training or isolated rollout—a flavor of the month. There must be continuous follow up and clear, consistent communication to all employees. Leveraging customer and employee stories and rich media, that include both the facts and emotion of your efforts, will create a lasting impact with all audiences.
- **External:** Publicly state and provide continual updates to investors, analysts, media, and other external stakeholders regarding CX efforts and their impact on the business. Communicate to your customers through in-store signage, personalized digital messages, social media, your website, news, and bylined articles. This not only brings you credit where it's due and ensures future accountability, but helps attract the right kind of employees—and customers—to your business.

# Organized for Success

*Few companies were born CX-centric, at least by today's standards. Most brands need to shift their organizational structures to fit and flex with emerging trends and needs. This means bringing your people, processes, and technologies together under your stated vision. While a customer-centric culture is essential, you must also have the right organizational pieces in place to see your vision through.*

## **DEDICATED CX LEADERSHIP**

There are a few brands that were created with CX as part of their DNA and may not require dedicated leadership to build and sustain the mentality. For the majority of organizations, however, having a defined role and dedicated team is essential. Identify a person or department charged with defining CX vision and strategy, collaborating with the broader organization to create alignment, and then holding stakeholders accountable for CX success. It's imperative that CX isn't just another part of someone's larger job—but their entire job. With this focused view, it's easier to identify and act on areas of opportunity, reduce costs and friction points, and improve customer journeys.

A CX program owner may roll up to a dedicated CX executive, the COO, or as we're seeing more frequently in recent years, the CMO. Either way, CX needs a singular, dedicated owner within the brand.

## **CROSS-FUNCTIONAL GOVERNANCE**

CX initiatives falter when companies operate in silos. Departmental silos. Data silos. Listening silos. Insights and decision-making silos. When various departments own different touch points and operate disparate listening programs in each channel, it's a recipe for more of the same. Cross-functional teams, with representatives from each department, help break down silos and bring everyone's unique perspectives and problem-solving skills to the table. The chosen representatives should be proven CX champions with an in-depth understanding of the company's vision—and political and operational landscape. Building solid internal relationships with those who have influence throughout their respective departments promotes goodwill, the sharing of ideas, and ensures the company's vision is prevalent across teams. A recurring cadence of

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meetings and communications to discuss and showcase initiatives, and how each department plays a critical role in customer experience, encourages buy-in and accountability.

### **NECESSARY INFRASTRUCTURE AND RESOURCES**

This is where technology comes into play, and the first must-have is a comprehensive platform that seamlessly supports essential CX functions such as Voice of Customer, Voice of Employee, Employee Engagement, and closed loop/case management. The insights that come from these platforms are the compass and fuel for informed and effective CX initiatives that optimize stakeholder relationships and provide data-driven guidance for steering the entire enterprise. Of course, this is all for naught if you don't take action on the insights. Leading brands continually invest in top CX initiatives—identified and prioritized based on the insights gathered from a comprehensive platform.

### **WELL-UNDERSTOOD CUSTOMER AND EMPLOYEE JOURNEYS**

There are very few predictable customer journeys anymore. In the past, a customer saw your ad in the newspaper, came into your store, and purchased a product. With ecommerce, social media, pop-up markets, and more, customers and employees have more ways than ever to interact with your brand. And these interactions are not linear; they span multiple channels across days, weeks, months, or even years. This complexity makes it even more important to understand how customers experience your brand. While it may feel overwhelming to attempt to identify all of the possible ways customers will interact with and move through your brand, don't try to boil the ocean. Focus on the essential journeys that are most important to your customers and your brand promise.



# Data Accessibility and Readiness

IN ORDER TO KNOW  
WHERE YOU'RE GOING,  
YOU HAVE TO KNOW  
WHERE YOU'VE BEEN.

*Listening alone is not enough. Both how and where you listen should be purposeful. When CX initiatives feel more like a conversation than an interrogation, you're presented with infinitely more authentic, comprehensive, and valuable data. Plus, the insights garnered from Voice of Customer and Voice of Employee programs become exponentially more valuable when paired with contextual data—both indirect and inferred—that goes beyond surveys. When you can trust the data and subsequent insights, you'll have confidence as you allocate resources to targeted areas of the business.*

## **BASELINE UNDERSTANDING OF CUSTOMER PERCEPTIONS**

In order to know where you're going, you have to know where you've been. Competitive benchmarking, brand tracking studies, and structural equation modeling help set a baseline for your organization, enabling you to understand how customer perception, satisfaction, and loyalty are trending as well as how your customers feel about and experience your brand.

## **HOLISTIC LISTENING STRATEGY**

We've said it before and we'll say it again: how you listen matters. Most brands give customers the option to provide feedback through just one channel, such as a web or voice survey. In addition to these traditional methods, best-in-class brands give customers the option to leave feedback on their own terms, through video, mobile voice and apps, and social channels (e.g., Facebook, Yelp, Twitter, and Google+). This allows for truly authentic conversations with a personal touch that are otherwise difficult to capture. A customer-centric approach to listening makes it simple and quick for your customers to leave feedback in a way that makes sense to them, and gives you better data.

## **DEPLOYMENT OF LISTENING POSTS AT PRIORITIZED TOUCHPOINTS AND JOURNEYS**

Where you listen matters as well. Are you only collecting feedback from the in-store experience when customers prefer to shop your brand online? Are you missing a key opportunity to collect



non-purchaser feedback? Focusing on the touch points that matter most to the customer and most significantly impact your business will deliver intelligence that allows you and your customers to co-create more meaningful experiences. It also ensures your business has a more complete view into how customers experience your brand.

### **COLLECTION AND DE-SILOING OF CONTEXTUAL DATA**

Customer and employee feedback is inherently valuable in uncovering friction points and areas of opportunity. However, the more contextual data you append to customer feedback (e.g., financial, operational, digital, and CRM/loyalty), the richer the subsequent knowledge becomes. Contextual data can be about the customer (e.g., spending habits with your brand, past service issues, demographics), behavioral (e.g., digital

breadcrumbs such as web page dwell time), or tie in others elements of the experience (e.g., time of day, the weather, or which staff members were working). This helps you see the bigger picture, identify all of the potential factors that influence customer experiences, and understand how it all ties back to the bottom line. As trends emerge, both in customer feedback and the contextual factors affecting experiences, you'll be able to allocate resources to the appropriate initiatives.

# Value Framework

*Improving your NPS, OSAT, and other traditional CX metrics is great, but if you can't tie CX efforts to business-wide KPIs and financial results, you'll constantly be questioned on the program's value. Intelligence gleaned from customer feedback can impact every department in a company, but few organizations are disciplined enough to reap the full range of benefits. CX intelligence is a guidance system that delivers insights on how to improve operational efficiencies, coaching and training, retention, employee morale, and more. A value framework helps hold the business accountable, proving that CX isn't just the right thing to do for customers, but the right thing to do for financial health—and continued growth.*

## CLEARLY-DEFINED CX KPIS THAT DRIVE BUSINESS OUTCOMES

CX for CX's sake—because it's the “nice” or “right” thing to do—is simply not sustainable. Identifying what your business is trying to achieve, and leveraging that to develop specific CX KPIs that support your broader goals, will align your CX program with business objectives. Driving action in these areas will ensure your program supports and helps to achieve the broader organizational goals. For instance, it is not enough to merely set a goal to focus on improving satisfaction with “the contact center experience.” This is too vague and does not specifically tie to business outcomes. Identifying specific objectives important to leadership (e.g., reducing contact centers costs), will help you create a CX program with KPIs that can influence this goal. In this case, if you want to enhance the contact center experience while also helping the organization meet its goals, focus on first call resolution—it will not only improve customer satisfaction, but also reduce cost. Once leadership sees the value in CX, the next evolution is to ensure that corporate goals and objectives are always set using the CX lens.



## **OVERARCHING CX METRICS WITH ESTABLISHED LINKAGE TO FINANCIAL PERFORMANCE AND/OR COST STRUCTURE**

Best-in-class brands don't take CX programs—and their continued existence—for granted. By identifying the measures of success for the board and C-level, CX professionals can purposefully map their initiatives to support them. This is the single most effective way to demonstrate the value of CX in a language executives understand. For example, reducing churn and improving customer satisfaction are among the most straightforward indicators that things are going well, plus, it's fairly simple to measure their specific ROI. Performing a linkage analysis tying CX performance to bottom-line business results ensures continued buy-in, engagement, and funding. This isn't a one-time exercise, but an ongoing evolution to ensure you continue to focus your efforts on the areas that drive business results.

## **PRIORITIZATION OF JOUR- NEYS BASED ON IMPACT TO THE BUSINESS**

Not all journeys are created equal, and without a guiding system in place, it can be overwhelming to attempt to decipher which journeys should be

prioritized. Having the right contextual data, survey(s), and reporting in place allows you to distinguish which journeys—and the touch points within them—have the greatest impact on your business, financial and otherwise. Be careful not to fall into the trap of simply focusing on the lowest performing journey or touchpoint. Instead identify those journeys that have been proven to matter most to the customer and to your brand. Further, understanding your organization's readiness to overhaul particular journeys—some will take significantly more time and resources than others—will help prioritize areas for improvement.

## **DEFINED ANALYSIS PLAN, INCLUDING ROADMAP AND SUCCESS METRICS**

We often call this “know what you want to know.” It's one thing to collect and analyze data, but it's another to think about what you'd like to learn within the next six, twelve, or eighteen months. By identifying what you want to know, you're able to set up listening posts in the appropriate places, ask the right types of questions, and decide what kind of analysis you need.

# Empowered and Aligned Employees

*By helping your employees become increasingly successful in their roles, they bring more value to your customers and your brand. So how do leading brands seamlessly meld EX (employee experience) with CX initiatives? By making employees part of the CX solution, companies are rewarded with a passionate, empowered workforce and new ideas and insights even their customers can't provide.*

## **EXPLICIT LINKAGE OF EACH EMPLOYEE'S ROLE AND ACTIONS TO CX SUCCESS**

Every employee at your company, whether they want to believe it or not, plays an important role in customer experience. They're serving customers—either directly or indirectly—and in both

cases, impacting experiences on the front line. This notion is more tangible for front line employees and store managers, yet, more abstract for employees stationed at corporate headquarters where direct customer interaction is limited or non-existent. Help each employee understand how their role leads to CX success—how they play a critical part in the company's stated vision—by weaving this narrative into training and development courses. Further, get a head start by implementing hiring practices that identify empathetic, customer-focused people.

## **COMPREHENSIVE VOICE OF EMPLOYEE PROGRAM**

Many companies don't realize the wealth of knowledge already at their fingertips just waiting to be discovered.



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CUSTOMER EXPERIENCES  
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IMPACT ON CX.**

Who better to inform you of how customers experience your brand than the front-line employees who live it everyday? The employee's perspective on improving the brand's delivery of customer experience—known as Voice of Employee—provides brands with a unique look into the customers' experiences, emotions, and struggles. Plus, it empowers those employees to take ownership of CX outcomes. If you want your employees to know they are valued, proactively encourage them to share their ideas and opinions on how to deliver a better customer experience (as well as what's preventing them from doing so). And don't just ask for input; take their advice, and ensure they know they've been heard. This process not only gives CX leaders an up-close view of opportunities for improvement, it also supports the evolving company culture, hiring and training practices, and cross-functional alignment.

### **COMPREHENSIVE EMPLOYEE ENGAGEMENT PROGRAM EXPLICITLY LINKED TO CX INITIATIVES**

This is a simple case of looking in before you look out. Employee Engagement and CX efforts cannot live in silos; it's no secret that engaged employees are more productive and much more likely to provide a better experience for your customers (which both saves and makes

money for your business). And of course, satisfied and pleasant customers boost employee morale—it's a virtuous cycle. Employee Engagement efforts should be held in the same regard as CX efforts, and there should be a continuous effort to show the correlation between the two. By looking at your employee and customer experiences holistically, you'll better understand which drivers of Employee Engagement have the greatest impact on CX.

### **FRONTLINE EMPLOYEES EMPOWERED TO ACT ON BEHALF OF THE CUSTOMER**

Once you've hired and trained people that will live your brand values and treat customers the way you envision, empower your employees to make management-level decisions—in alignment with your stated CX vision—without manager approval. When it makes sense, allow your staff to go outside of policies that frustrate customers (or better yet, remove/change those policies completely). This gives your employees the opportunity to think creatively, which makes their jobs more fun and rewarding, while encouraging growth. It also attracts a different type of employee—the type that inherently “gets” customer centricity. When you empower front-line staff to act above their pay grade, you'll get performance to match.

# Conclusion

Many brands may never possess the resources to achieve every single point laid out above, while others may already be half way there. Regardless of your situation, crafting a comprehensive, effective, and sustainable CX strategy is an ongoing process that is never done; be sure to take pride in incremental achievements along the way. Best-in-class companies don't wait for or even seek perfection—they execute the strategy they have now and continually refine and adjust on the fly as the organization and business landscape changes.

CX strategy goes beyond surveying customers and reporting results. It even goes beyond ensuring customers are at the heart of your business: it's organizing your company for success, having the right technology in place, providing a framework to prove the value of your efforts, and securing employee buy in—from the CEO to the front-line staff. Those companies that dedicate the required resources to develop and promote a customer-centric culture quickly understand that the proven business value—both culturally and financially—is undeniable.



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## About InMoment

Improving experiences is why InMoment exists. Our mission is to help our clients improve experiences at the intersection of value—where customer, employee, and business needs come together. The heart of what we do is connect our clients with what matters most through a unique combination of data, technology, and human expertise. With our hyper-modern technology platform, decades of domain authority, and global teams of experts, we uniquely deliver a focus on Experience Improvement™ (XI) to help our clients own the moments that matter. Take a moment and learn more at [inmoment.com](https://inmoment.com)

