



Will Your Experience Improvement Program Stick?

Your CX Governance Checklist

We know that the most successful brands need a strategy to listen, understand, and transform their customer experiences (CX). If you're in charge of customer insights, you'll know what a challenge this is in a digital world where customer feedback is pouring into databases from all angles. Now more than ever, CX insights leaders and their teams are running into big obstacles when it comes to

stitching together data from across the business, getting it to the right people, and keeping your stakeholders inspired to move customers' experiences forward.

You've got questions and we've got answers. In this new digital reality, it's important for customer insights leaders to create a framework that makes it possible to define best

customer experience practices for the entire organisation—we call this "governance." After the framework is created, it should be applied consistently across every function, department, business unit and region in your global enterprise. Take a look at the checklist we've put together to make sure you have covered governance from every angle.

Which businesses are great at CX Governance?



SUPERANNUATION: COMMONWEALTH SUPER CORPORATION

- Involves leadership in its customer experience program design to increase exec-level engagement later on
- Successfully rebranded its experience program with "The Compass" guiding the way (more info below)



UTILITIES: SYNERGY

- Discovered CX Champions across the business to promote the program internally
- Co-designed dashboards with important stakeholders to fit the exact needs of each role
- Ensures that the customer experience conversation is considered "business as usual"



What's the Point of Governance?

Essentially, governance takes the confusion out of the CX equation. Your governance framework will pull together proven processes, best practices, and advanced technology tools to align every aspect of your program—this helps your business stay laser-focused on its objectives. With a governance framework, you can:

- ✓ **Establish Consistency:** When processes are confusing and inconsistent, it's no secret that team members will feel overwhelmed and disengaged. A governance framework helps you identify best practices that make your experience program accountable and enable you to move the needle on improving experiences.
- ✓ **Build a Strong Foundation:** You need to lay the groundwork for a vibrant, sustainable, and unified CX program that translates experience investment directly into measurable business results.
- ✓ **Establish Your Benchmark:** In order to know how far you've come, you have to understand

where you started. A governance framework will help you measure, benchmark, and link results across your program so you can truly understand the impact.

- ✓ **Manage Risks:** Use your governance framework to get ahead of the isolated, ad-hoc experience initiatives.

With effective governance, your CX data and processes are held to a higher standard that drives accountability and action. Sound governance principles provide the structural foundation you need to elevate your experience program and achieve meaningful, measurable results.

EXPERIENCE CHALLENGES

Challenge: The Wrong Data in the Wrong Hands

"I've tried my best to keep the right people informed on how our experience program is performing, but with so many employees coming and going from our business, I have a really hard time getting the right information to the right stakeholders. How can I fix this?"

CX Insights Lead, Australian Automotive Company

Challenge: Surveys Are Inconsistent

"We've had a CX program up and running for years, and I'm noticing lots of different types of surveys that are inconsistent with our brand. Do you have any ideas?"

Voice of Customer Lead, New Zealand Superannuation Brand

Challenge: People Across the Business Not Invested in Experiences

"I lead a CX team in the insurance industry, and we find it so tricky to keep different teams in our business engaged in the program and its results. We know the program's success depends on our ability to communicate the value of the program to the exec team, and also keep our employees inspired to participate in customer outcomes. How can we solve this once and for all?"

Head of Insights, Australian Insurance Company

Governance Checklist

#1

Who's in Charge of CX?

Create a strategic CX governance leadership team and success framework.

- Have you designated who's in charge of the program?
- Have you outlined your cross-business communication plan?
- Have you accounted for situation awareness?
- Is your program agile?

#2

What Are the Rules and Regulations of Your CX Program?

Build and deploy a governance structure that will stick.

- Have you decided what you are working toward?
- Do you know what the ultimate benefit is to the business if the program is successful?
- Have you decided what your surveys should look like?
- Have you decided when the program launches?
- Do you have a plan for recovering customers?

#3

How Do You Inspire Team Members Across the Business?

Find CX champions, inform your partners and spread the word about your program.

- Do you have a name for the program?
- Have you outlined the program elevator pitch?
- Do You Have a Plan for Keeping Employees In-the-Loop?
- Do you know how you will show the business that the program is working?
- Do you have a reward system in place?

#4

Do You Have the Right Technology Set Up?

Support your CX governance efforts with the right technology platform.

- Do you have centralised, customisable CX governance dashboards set up?
- Have you outlined how you will close the loop with unhappy customers?
- Have you set up access rights management?
- Are your survey template libraries set up?
- Do you have your sample rules outlined?

#5

What Is Your Plan for Continually Improving Your Program?

Establish a sustainable, continuously evolving framework for success.

- Do you have a plan for reviewing the program obstacles, shortcomings, and successes?
- Does your program meet your business goals and objectives (i.e., retention, acquisition, growth)?
- Have you identified a cadence for taking action on customer insights?
- Do you have a plan for checking in with employees?





There Are Five Steps to Creating a CX Governance Framework

Bringing dozens (or hundreds) of different customer experience channels, programs, and initiatives together into a single, well-governed framework can feel

like an overwhelming task—especially for large, complex global enterprises.

We've put together a roadmap of five steps to help you nail down governance principles which will be totally unique to your business.

#1

Who's In Charge of CX?

#2

What Are the Rules and Regulations of Your CX Program?

#3

How Do You Inspire Team Members Across the Business?

#4

Do You Have the Right Technology Set Up?

#5

What Is Your Plan for Continuous Improvement?

Who's In Charge of CX?

This step is all about creating a strategic CX governance leadership team and success framework.

Every successful governance effort begins with a smart, capable and empowered team. That means going through the process of identifying, organising, and preparing a Governance Council with the appropriate mix of executive, business, functional and operational experience and leadership.

This exercise puts you in the best possible position to design a best-practice gov-

ernance framework model for your business, make a strong case for the ongoing funding and administration of your governance efforts, and develop an effective change management process. These efforts will also provide a detailed roadmap for the implementation of your governance solution.

Without this structure, the organisation is effectively flying blind and could be making decisions based on incomplete information.



TAKE ACTION! IT'S TIME TO GET YOUR TEAM TOGETHER TO ANSWER SOME IMPORTANT QUESTIONS.

Who owns the CX program?

You'll know who is accountable for specific activities and outcomes so that the extended team feels invested in getting things done.

What is your cross-business communication plan?

You'll know what the lines of communications are so you can navigate risk/change management, communications delivery, and most importantly, reporting.

Do you have situation awareness?

You need good information about what is going right and wrong, which allows for timely and effective decision-making and planning.

Is your program agile?

Bracing for agility means your program is able to jump over any hurdles that surface, adapting as needed to changing circumstances.

What Are the Rules of Your CX Program?

This step is all about building and deploying a governance structure that will stick.

With your team in place, you can begin creating the foundation of your new governance framework. This involves creating and deploying the detailed policies, ownership, roles, responsibilities, processes, and rules that will drive CX consistency, alignment, and action across your entire organisation. This step is super important for encouraging a culture of customer experience that different business units will be excited to participate in.



TAKE ACTION! IT'S TIME TO GET YOUR TEAM TOGETHER TO DISCUSS WHAT BEST PRACTICE LOOKS LIKE FOR YOUR TEAM AND WHAT KIND OF MECHANISMS WILL BE STICKY IN YOUR BUSINESS FOR DRIVING CULTURAL CHANGE.

What are you working toward?

You'll need to define goals, outcomes, and KPIs to measure progress and determine success.

What is the ultimate benefit to the business if the program is successful?

It's important to clearly identify what success looks like in a business outcomes roadmap. Essentially, this roadmap shows the relationships between intermediate benefits (omni-channel listening created) and business outcomes (selling costs decreased), and the actions needed (rollout collection) to achieve them.

What do your surveys look like?

It sounds simple, but the basics are important. Write down your established survey types, the questions you are asking customers, and how frequently you are sending out surveys.

When does the program launch?

Document roll-out timelines so everyone in the business can be prepared.

What is your plan for recovering customers?

List out actions for customer recovery and process improvements.

How Do You Inspire Team Members Across the Business?

Find CX champions, inform your partners, and spread the word about your program.

In this step, you'll focus on engaging your program's biggest fans: people we like to call "CX champions." These champions will be the ones leading the charge on program initiatives and inspiring your employees, business partners, and customers. After identifying the champions, you'll need to develop a training and communication plan that makes sure your cross-functional leadership and management are communicated consistently across every part of your business, driving change, and making sure it sticks.



CLIENT STORY: COMMONWEALTH SUPER CORPORATION (CSC)

One example of governance-in-action is Commonwealth Super Corporation (CSC). An artefact of CSC's newly rebranded CX program is "The Compass" to represent the CSC customer base. The goal of The Compass is to guide the business toward customer-centric decision making. Just like a compass will point you in the right direction, when the business focus shifts toward a direction that is not customer-focused, the idea is that the customers, or The Compass, will re-centre the team. Early feedback across the business is that The Compass has been a powerful metaphor to help sell the program internally, engage frontline staff and motivate cross-functional teams.



TAKE ACTION! THIS IS THE FUN PART! IT'S TIME TO BRING YOUR EXPERIENCE PROGRAM TO LIFE.

1

What do you call your CX program?

Think of a memorable and meaningful name that can help create internal excitement for the new initiative.

2

What is your program's elevator pitch?

This is useful for providing a quick, compelling soundbite of what your program is all about. This quick introduction should focus on answering the big-picture questions: What does it mean for your brand if customers are happy with their experiences? And why do we care?

3

How will you keep employees in-the-loop?

In order for your program to be successful, there's no way around it: your employees need to be on board. To do this, be sure to share your current goals, outcomes, and KPIs (like Customer Satisfaction, NPS, Customer Effort Score), through the company intranet, lobby screens and printed posters. Sharing positive scores recognises and rewards the efforts of your employees. And when scores are not meeting expectations, you can use them as motivation to learn and make necessary changes.

4

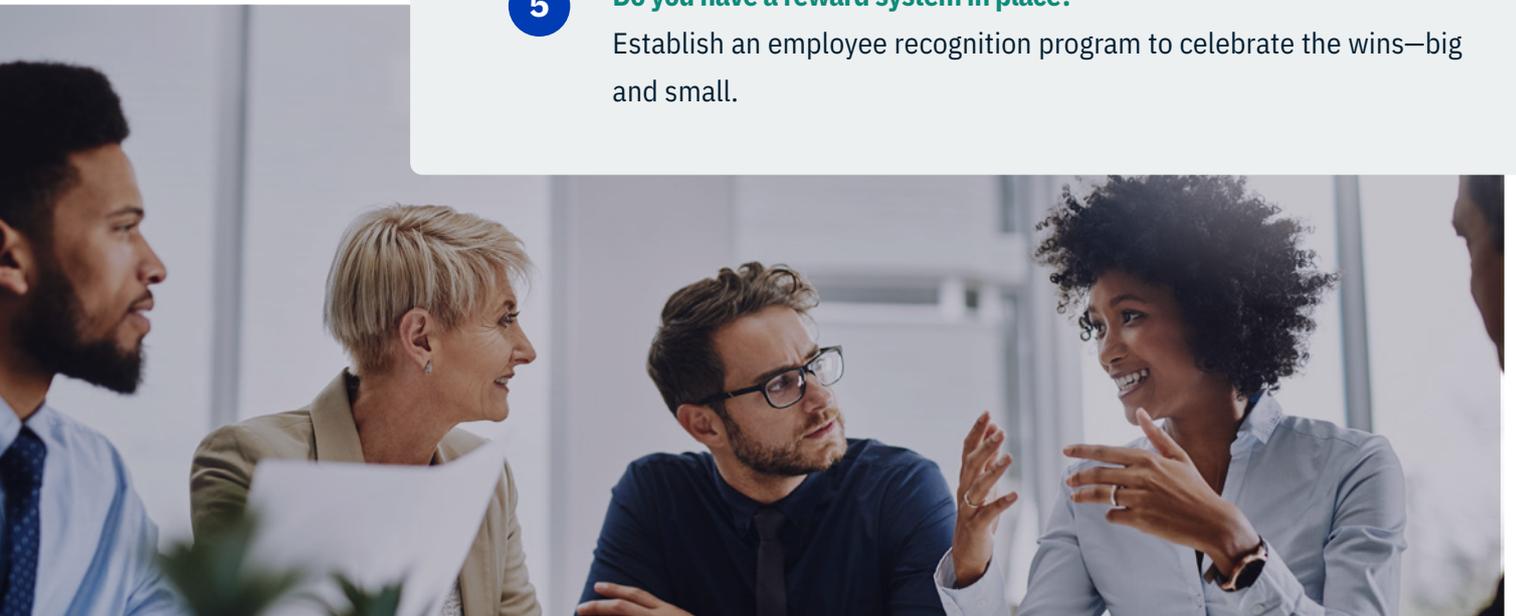
How will you show the business that the program is working?

Publish experience success stories as scrolling customer comments on your intranet or in "feel good friday" emails. Use challenging customer situations or less-than-ideal outcomes as "case studies" to help drive improvements.

5

Do you have a reward system in place?

Establish an employee recognition program to celebrate the wins—big and small.



Do You Have the Right Technology Set Up?

This step is about supporting your CX governance efforts with the right technology platform.

Planning and people play an essential role in any governance solution. But you also need a technology platform that can fully support the needs and goals of your governance efforts.



TAKE ACTION! DOES YOUR TEAM HAVE AND USE THESE ESSENTIAL TECHNOLOGICAL FEATURES?

Do you have centralised, customisable CX governance dashboards set up?

These dashboards make it easy for business leaders to see and track the effects of your governance framework on CX program results, quickly identify gaps and problems, and take fast action to correct them.

How will you close the loop with unhappy customers?

Your platform should have case management tools that support closed-loop, real-time responses to alerts generated from customer and employee data.

Have you set up access rights management?

This feature makes sure the right information is in the right hands. Your platform should allow you to grant and limit access to specific features and capabilities based on whether people are properly trained and what they need to do their jobs.

Are your survey libraries set up?

These facilitate and support your efforts to use consistent, effective surveys across regions and departments.

What are your sample rules?

These rules are typically set within and across surveys. This makes it easy to avoid inadvertent survey overlap and oversampling.



CLIENT STORY: SYNERGY

Leading Australian utilities provider, Synergy, set out to revamp its CX governance program last year. The business made it a point to designate CX champions across the business, co-design dashboards with important stakeholders to fit the exact needs of each role, and make sure that the customer experience conversation is considered “business as usual.”

The results for Synergy have been incredible! The frontline staff are actively consuming CX intelligence and better coaching conversations have helped to resolve contact centre enquiries. Synergy has seen a 10.3% improvement in customer effort scores for their business contact centre and +1,000 dashboard logins per month (compared to <200 the previous year).



What Is Your Plan for Continuously Improving Your Program?



TAKE ACTION! WHAT DOES CONTINUOUS IMPROVEMENT LOOK LIKE TO YOUR TEAM?

How often will you review the program, obstacles, shortcomings, and successes?

Establish a quarterly cadence for checking in and adapting efforts as your business evolves.

Does your program meet your business goals and objectives (e.g., retention, acquisition, growth)?

Define which business objectives are most important to your business when designing your program, track your progress, and review in your quarterly cadence meeting.

For a program to be sustainable, it has to be continuously evolving.

Launching a company-wide experience program is an ambitious undertaking. To succeed, it's important to develop and implement a launch plan that takes a holistic view of your entire organisation, leaves room for inevitable adjustments and course corrections, and accommodates change requests from individual departments, functions, regions and markets along the way. This is where a CX governance framework, structure, and leadership can shine.

It's easy to generate momentum and excitement when a new program launches. But the best governance programs are working toward continuous momentum, engagement, and agility so they can stand the test of time. Establishing a communication plan prior to the *CX program rollout* is critical in defining key messages for customers and employees from launch to realisation. After the program launches, it's vital that your employees continue to receive relevant, meaningful information and training as the

program matures. You should develop your plans with heavy involvement from the CX governance council and top management; if you secure the support of the CEO and other leaders, your initiatives will hold more weight. This agile adapt-as-you-go approach allows you to continuously adjust your implementation plan and governance to achieve the best possible results.

Many organisations begin by implementing their governance framework on a relatively small scale and then add new elements and components gradually. This makes it possible to gather feedback at each stage, refine your approach, and make any necessary course corrections, then to move on to additional vertical and horizontal adoptions. These strong feedback loops can drive continuous process improvement and help you coordinate changes across silos. As you roll out each stage of your governance plan, it's helpful to establish a regular CX program review cadence, so you can regularly evaluate your CX progress and make continuous improvements.



TAKE ACTION! WHAT DOES CONTINUOUS IMPROVEMENT LOOK LIKE TO YOUR TEAM?

What is your cadence for taking action on customer insights?

The best way to reach positive business outcomes is to fully digest customer intelligence and make a plan for putting their feedback into action. This should be done as often as possible.

Are you checking in with employees?

Your front-line staff are a gold mine when it comes to learning what customers are saying, as well as for making sure that customers are getting a great experience. Employee voices matter, which is why it's a good idea to extend your program to include "employee experiences" too.

If You Need Extra Support, InMoment Is Here to Help

Adding a strong governance foundation will transform your global CX program and increase your ability to turn customer feedback into concrete business results. And of course, InMoment is standing by to help you every step of the way, with technology and consulting engagements that cover the complete lifecycle of your governance solution.



Governance Consultation

This offering focuses on helping you identify the people, processes, technology, and metrics you need for an effective CX governance program.

THIS INCLUDES:

- Hosting a facilitated governance workshop
- Creating tailored governance charters, plans, processes, and cadences for your organisation
- Defining specific best practices for your governance program



Framework Design

We can help you get your goals in order so you have consistency across all of your disparate CX and VoC measurement programs. This process includes conducting a thorough governance audit and creating a detailed governance playbook that includes rules, survey libraries, templates, and other assets.



Add-on Implementation

With this flexible add-on offering, you work directly with our experienced governance experts to successfully implement and administer your global CX governance program. Just let us know what you need to get your governance program started on the right foot, and we'll provide the expertise you need to be successful.



Wrapping Up

Many businesses have ideas about how to govern their experience programs, but few have a well-defined governance framework to point to. Well-established CX governance is a pillar of organisational design that will support—not stand in the way of—your CX excellence. As your organisation unifies CX processes and engages employees with the vision of an elevated experience for every customer, your CX program will transform your business and your bottom line.

At InMoment, we work with clients around the world to place governance at the heart of their global CX programs and initiatives.

Learn more about how we can help your organisation combine technology, data, research, and governance expertise to help your business start improving experiences.

To demo a product or to contact us call:

NORTH AMERICA
1 800 530 4251

UK & IRELAND
+44 (0) 121 296 5245

APAC
+61 (2) 8397 8131

GERMANY
+49 (0) 40 369 833 0

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

