



Will Your Experience Improvement Programme Stick?

A Checklist for Your CX Governance Framework

Which Brands Are Great at CX Governance?



B2B: SCHLUMBERGER

- Inclusive approach to ensure global engagement with the programme right from the start, ELT backing, clear alignment with company priorities
- First ever global VOC programme with insights discovered, actioned and owned locally, enabled by the centre, leading to tangible improvements in key customer relationships and numerous value creation stories



UTILITIES: SYNERGY

- Discovered CX Champions across the business to promote the programme 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”

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.

EXPERIENCE CHALLENGES

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 programme and its results. We know the programme's success depends on our ability to communicate the value of the programme 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, Insurance Company

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.

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 programme—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 programme 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 programme 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 programme 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 programme and achieve meaningful, measurable results.

"If your customer experience strategy is your game plan, then the governance discipline supplies your referees and your rule book."

Outside In, Forrester Research



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 programme 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, Automotive Company

Challenge: Surveys Are Inconsistent

"We've had a CX programme 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, Government Pension Organisation



There Are Five Steps to Creating a CX Governance Framework

Bringing dozens (or hundreds) of different customer experience channels, programmes, 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 programme?

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 governance 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 THESE IMPORTANT QUESTIONS:

Who owns the CX programme?

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 programme agile?

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

What Are the Rules & Regulations of Your CX programme?

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 programme 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 (omnichannel 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 programme 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 programme.

In this step, you'll focus on engaging your programme's biggest fans, people we like to call "CX champions." These champions will be the ones leading the charge on programme 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: DSV

Customer feedback, ongoing trend monitoring, and the ability to gauge customer loyalty has now become a daily feature in business reporting and reviews. It is one of the main instruments in DSV's management decision making process. As part of the process, DSV created an important governance plan for their operating countries which ensures CX trend insight is fed back to country leaders and worked into their strategic plans, helping them to identify strengths and areas for improvement.



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

1

What do you call your CX programme?

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

2

What is your programme's elevator pitch?

This is useful for providing a quick, compelling soundbite of what your programme 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 programme 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

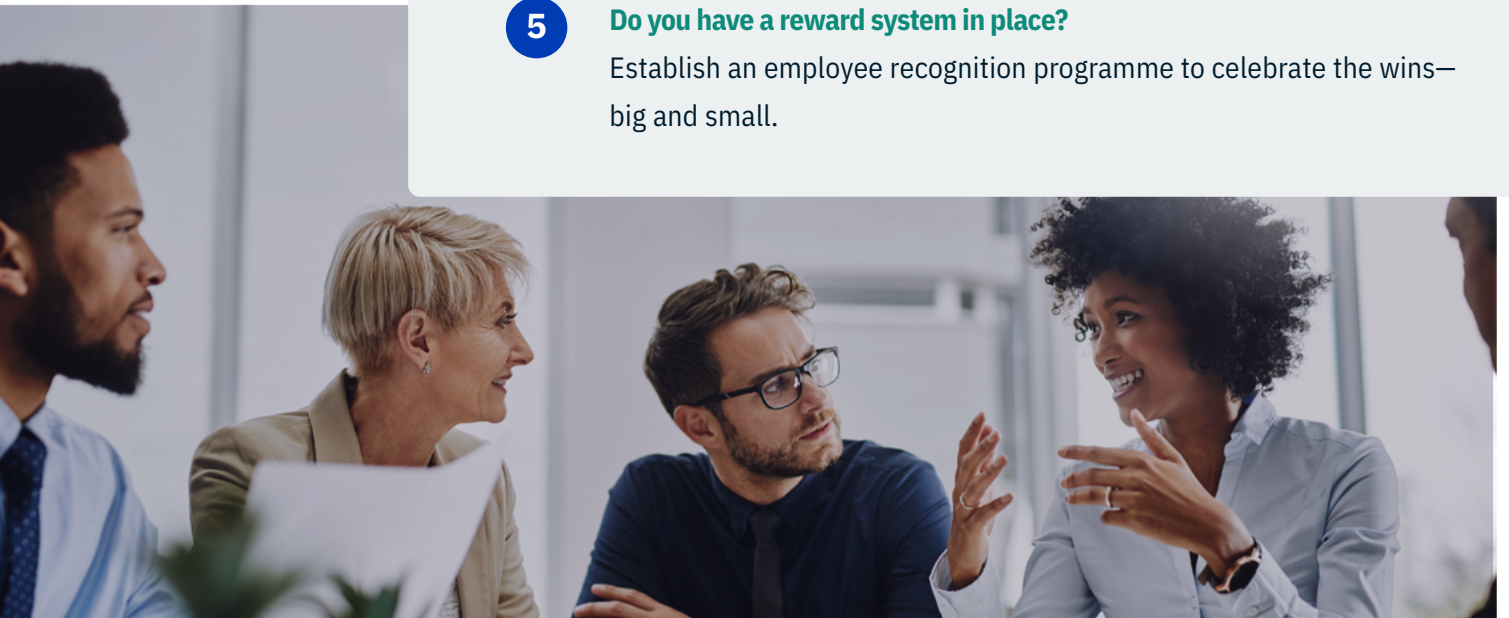
How will you show the business that the programme is working?

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 programme 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 programme 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: ALLIANZ

Leading insurer, Allianz, has standardised its global VoC programme around best practices and alignment with company goals. The blueprint that was co-created by representatives from different parts of the business includes inputs such as pre-populated customer data and customer feedback and outputs such as dashboards built around data hierarchies and tailored to stakeholders, decision makers and action takers. 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 Allianz have been incredible. The frontline staff are actively consuming insights and closing the loop with dissatisfied customers at a scale not seen until now.



What is Your Plan for Continually Improving Your Programme?



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

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

Establish a quarterly cadence for checking in.

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

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

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

Launching a company-wide experience programme 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 the CX governance framework, structure, and leadership can shine.

It's easy to generate momentum and excitement when a new programme launches. But, the best governance programmes are working toward continuous momentum, engagement, and agility so they can last the test of time. Establishing a communication plan prior to the CX programme rollout is critical in defining key messages for customers and employees from launch through to achieving the desired end-state. After the programme launches, it's vital that your employees continue to receive relevant, meaningful information and training as the programme 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 top leaders, your initiatives will hold more weight.

This agile, learn-and-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, and then 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 programme review cadence, so you can regularly evaluate your CX initiatives and results 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 insights 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 making sure that customers are getting a great experience. Employee voices matter, which is why it's a good idea to extend your programme to include employee experiences too.

If You Need Extra Support, InMoment Has a Governance Team That is Here to Help

Adding a strong governance foundation will transform your global CX programme 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 programme.

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 programme

Framework Design

We can help you get your goals in order so you have consistency across all of your disparate CX and VoC measurement programmes. 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 programme. Just let us know what you need to get your governance programme started on the right foot, and we'll provide the people and expertise you need to be successful.



Training Plans



Templates



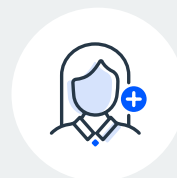
Opt-outs



Sample Rules



Dashboards



Access Rights

Wrapping Up

Many businesses have ideas about how to govern their experience programmes, 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 programme 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 programmes 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.



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 programme?
- ☐ Have you outlined your cross-business communication plan?
- ☐ Have you accounted for situation awareness?
- ☐ Is your programme agile?

2

What Are the Rules of & Regulations for Your CX programme?

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 programme is successful?
- ☐ Have you decided what your surveys should look like?
- ☐ Have you decided when the programme 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 programme.

- ☐ Do you have a name for the programme?
- ☐ Have you outlined the programme elevator pitch?

3

CONTINUED

- ☐ Do you have a plan for keeping employees in-the-loop?
- ☐ Do you know how you will show the business that the programme 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 programme?

Establish a sustainable, continuously evolving framework for success.

- ☐ Do you have a plan for reviewing the programme obstacles, shortcomings, and successes?
- ☐ Does your programme 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?

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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

