

# Help Your People Become More Customer-Centric: An Education, Training and Engagement Blueprint

Proven techniques and a structured approach for embedding customer-centric behaviors and attitudes in your organization.

An McorpCX Best Practices Webinar

mcorpCX



# Your hosts for today:



**Diane Magers, CCXP**  
Advisory Director at  
McorpCX and Emeritus  
Chair of the CXPA

- Accomplished Experience Management, Sales, and Transformation Executive
- Has led and advised on experience disciplines for major brands across the globe for over 25 years
- Previously CEO for the CXPA (Customer Experience Professionals Association)
- Professor of Practice, MS-CXM program at MSU & Journey Management at SMU



**Suzi Earhart, CCXP**  
Practice Leader,  
Program and Change  
Management

- Expert contact center, IT, and operations business executive.
- Led 6 customer experience transformations for 5 firms, driving NPS up, and service costs down
- VP of CX for two companies
- CCXP, Certified Customer Experience Professional
- Prosci® certified Organizational Change Management Practitioner



**Michael Hinshaw**  
Founder and President,  
McorpCX

- CX industry pioneer and thought leader on over a dozen “Global CX Thought Leaders to Watch” lists
- Founder of \$300M business built on customer experience principles
- Best-selling author: *Smart Customers, Stupid Companies: Why Only Intelligent Companies Will Thrive, and How To Be One of Them*
- Mentor and Richard H. Holton Teaching Fellow at U.C. Berkeley’s Haas Business School

# Customer Experience and Experience Management is all we do, and all we have ever done, across three core areas

## Building Experience Management Capabilities

**21 Attributes Identified for Consideration**

**7 Priorities (A)**

1. Develop Business Case for CX
2. Develop a CX strategy aligned with business goals
3. Build out CX operating capabilities
4. Build out CX design and innovation capabilities
5. Build & implement CX measurement framework
6. Expand governance and culture activities/programs aligned across ALL capabilities
7. Ensure Process and Technology organization align to CX strategy

Note: All relevant low performing, high importance attributes will be prioritized for improvement in the transformation roadmap. The workshop focused on the next 12 months.

Define and embed capabilities, knowledge and skills, education and training

## Transforming Customer and Employee Experiences

"I know I should be planning for the future and start thinking about saving, but I want to enjoy life now."

Hilary Young, Digital | Saniermont

Member | Digital | Data Sub-Journey

Public | Travel to Member | Birth, Death and Member Journey

Human-centered experience design, persona, segmentation, journey mapping

## Running VoC and Listening Systems ('Listen, Analyze, Act')

Period: [dropdown] Trend: [dropdown] Trend: Decreased Stable Increased

VoC Experience - Average of selected effectiveness, ease and stress metrics

Onboarding Stage

Day 1 (Training Touchpoint)

Day 30 (End of Onboarding)

Net Score: -53%

Design, deliver and operate Voice-of-Customer (VoC) programs

# Serving mid-market and enterprise clients across a handful of core industries in consumer, B2B and B2B2C market models

## Financial Services



## Insurance



## Retail



## Technology



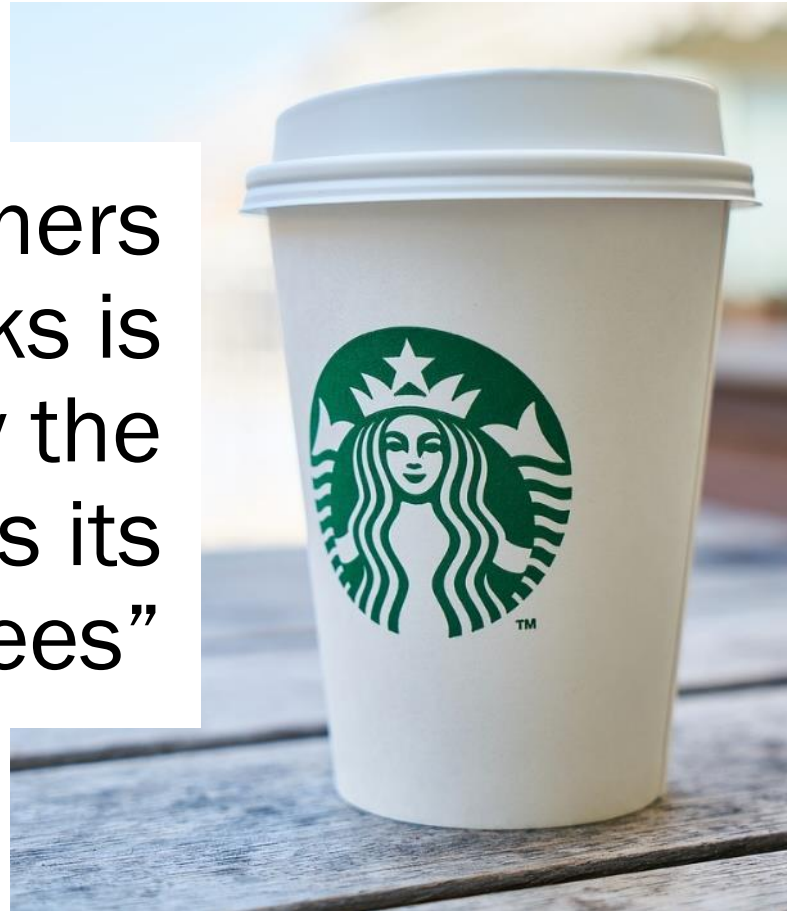
## Life Science



**Today: The importance of education  
for driving experience-led change;  
An education blueprint: Helping  
your people become more customer-  
centric; The best ways to embed  
knowledge and skills; In closing...**

# When employees know how to act customer centric, customers notice—and behave in ways you want. There’s a direct linkage.

“87% of customers affinity to Starbucks is driven by the way the company treats its employees”



# But being more customer centric requires knocking down silos, shifting culture, and upskilling your people



...of executives said CX is important, and said they act accordingly<sup>1</sup>

Also, in 2022... as rated by CX leaders:  
The 5 biggest obstacles to customer experience success

1. Organizational Silos

2. Company Culture

3. Business Processes

4. Technology

5. Skills and Training

*“What got us here, won't get us there.”*

*Marshall Goldsmith, Leadership Thinker*

# It's not just executives and customer experience teams that make this work. Everyone needs to understand how to do it.








# You do this by empowering, upskilling, and motivating your people



# Driving commitment and alignment across levels and roles

	<b>Direct</b> Interacts with customers directly
	<b>Indirect</b> Designs and influences customer interactions
	<b>Low Contact</b> Supports the people and systems customers interact with

“I understand what our goals are, the part I play in achieving those goals, and how my behaviors and contributions fit into the bigger picture.”

# Six (more) reasons to involve everyone in the change to being experience-led, and why you should involve them early...

## Creates a Learning Culture

Opportunities to gain knowledge, and practical skills creates a learning culture.<sup>1</sup>

## Enables Agile Issue Resolution

Drive feedback that helps identify and address issues more quickly.<sup>2</sup>

## Creates Ownership and Adoption

Employees are more likely to take ownership of change when they are involved early.<sup>3</sup>

## Drives Cross-Org Collaboration

Different teams working together facilitates cross-functional collaboration.<sup>4</sup>

## Drives Better Resource Allocation

Early insights drive prioritization for technology, training, and support investments.<sup>5</sup>

## Reduces Resistance to Change

Employees are more likely to support change when they understand the “why”.<sup>6</sup>

The critical mass for driving organization-wide, customer-centric change may be easier to attain than you think....



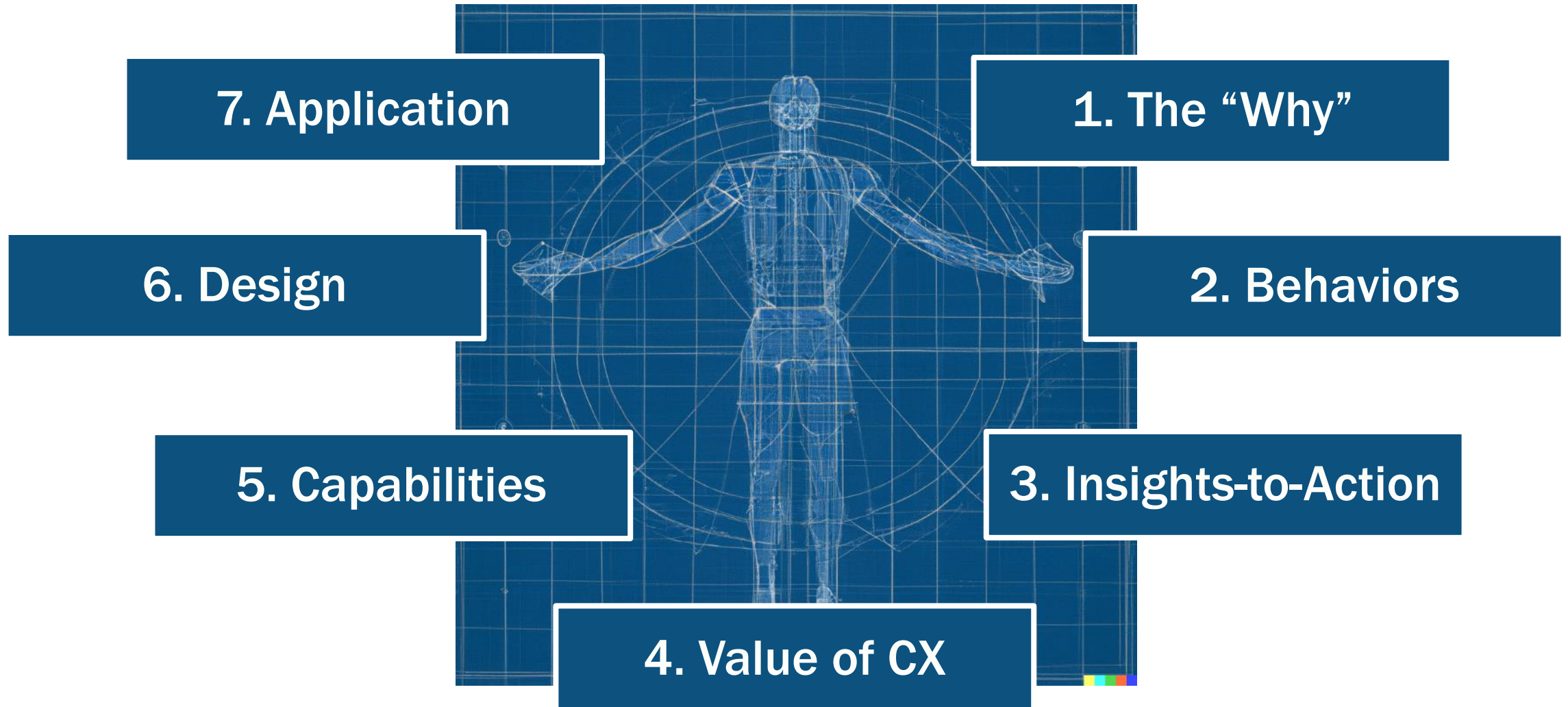
25%

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# Finding and enabling YOUR 25%: Equip everyone with the concepts and tools they need to be experience champions

*“The world needs more people with the skills to move groups of diverse people to collaboratively solve complex problems and design products, services, environments and interactions that impact lives.”*

# The path to get there: Design your experience-led, customer-centric education blueprint to include these 7 critical skills.



# Skill Area 1: Understanding the customer experience imperative

What it is, What it isn't.  
Getting to the Why.  
Emphasizing the How.  
Curiosity and Creativity.  
Taking Ownership.  
Thriving.  
Innovating.  
Driving Growth.



[It's about Human Lives]





## Skill Area 2: Embracing customer-centric behaviors

Everyone is part of the Engagement Ecosystem

What we do every day.

Every...

Decision

Thought

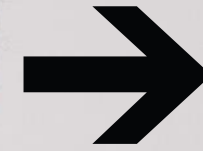
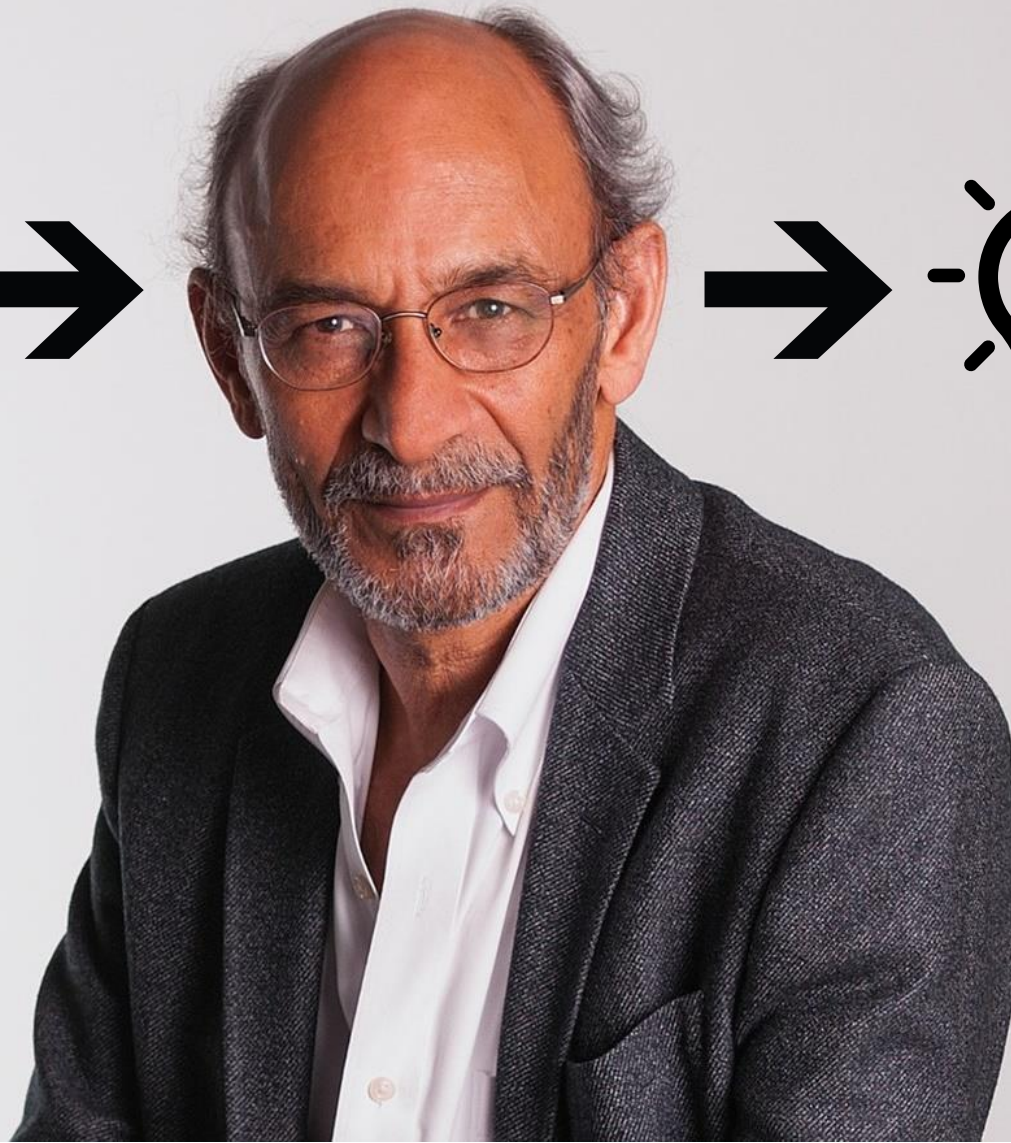
Action

Outcome

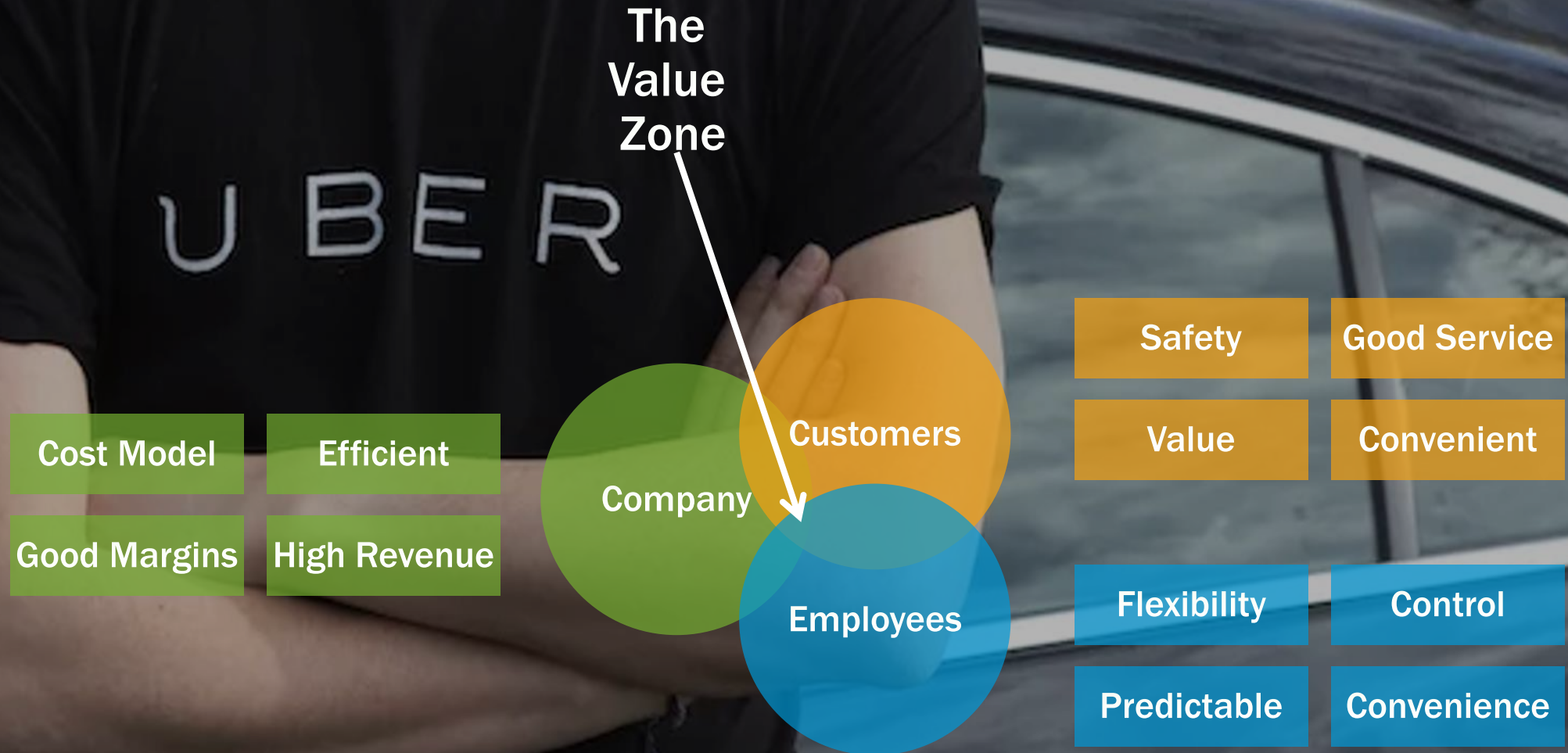
Impact

Every person knows what it takes... to deliver engaging human experiences

## Skill Area 3: Linking experience insights to action



# Skill Area 4: Understanding the value of better experiences



# Skill Area 5: Building capabilities and competencies

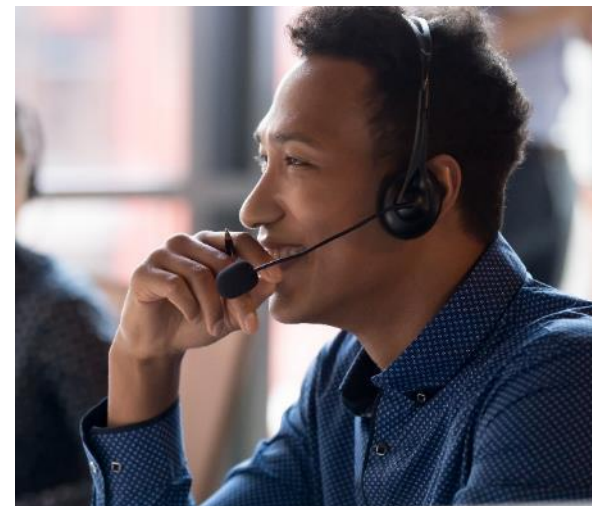
How do you simply know...

When an organization is customer centric?

That CX is in their DNA?

Where it's obvious...

“That’s just the way things are around here.”



# Skill Area 6: Experience design and design thinking

Marketing

Guest Services

IT

Partnerships

Sales

Executive

Everyone Owns Design

Intentional  
Pervasive  
Human-centered  
Collaborative  
Consistent  
Innovative

# Skill Area 7: Apply these skills (WIIFMU, or “What’s in it for me/us?”)



Autonomy  
Valued  
Resilience  
Control  
Career Advancement  
Recognition  
Impact  
Contribution  
Enabled  
Agility  
Innovative  
Collaborative  
Willing to Lead  
Confident  
Trusted (and Trusting)  
Wellbeing  
Involved and Engaged  
Voice That's Heard  
Role and Goal Clarity  
Connected  
Empowered  
Inspired

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# Our education and training philosophy: Connected, contextual learning and doing helps drive measurable behavioral change.





# Different techniques for different learner styles and goals



Broadly distributed eLearning, with a common goal and curriculum



Cohort-based learning to drive accountability and retention



Hands-on, interactive workshops and “mini labs”



Role-based training to deeply embed specific skills and behaviors

***“Knowledge is power? No. Knowledge on its own is nothing, but the application of useful knowledge, now that is powerful..”***

*Rob Liano, Author*

# Bridging organizational silos with a shared understanding

Common vision of success, shared knowledge, tools, and skills to make it real, and shared commitment



# Our suggested approach in action: The Hanover Insurance



1. Assembled cross-functional stakeholder team



2. Defined Desired Outcomes



3. Business Case Developed



4. Built Training Blueprint



8. Built Trainer and Learner Guides



7. Began Co-Development Process



6. Designed Hybrid Learning Modules



5. Executive Review and Approval



9. Pilot Delivery and "Train-the-Trainer"



10. Evaluate and Adjust/Modify Program



11. Systematic Rollout



12. Continue to Measure and Improve

# Measurable impact for the business, and their people

**Delivering qualitative and quantitative results...**

*“It gave a new way of looking at our customers. A new way of thinking...”*

*“...the combinations of interactive, group and lecture sessions kept me engaged and interested...”*

*“It provided me with tools I can apply immediately... And practical advice for actionable positive change...”*

**Manager and Staff Comments**

**NPS (Net Promoter)**



**Courtesy and Respect**



**Perceived Flexibility**



**Measured Pre- and Post-Training**

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# In closing: What you can do tomorrow to get started ...

## Questions to Ask

- What behaviors are you trying to change?
- Ask your people what they need to “be more customer-centric”
- Ask L&D “What works, and how does this fit?”
- What employee, customer, & business goals are a priority?

## Pitfalls to Avoid

- Lack of clarity on what needs to change
- Treating education as a ‘one and done’ event
- Not deeply involving your employees early
- Not considering ‘blended’ learning
- Not building a clear business case

## Actions to Take

- Learn what works in other organizations
- Find leaders across your org, and form a cross-functional team
- Find a willing, engaged stakeholder
- Pilot “learn, try, apply”
- Borrowed authority” (Yup. Experts like us ;-)

**What questions do you have? Let's chat...**



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