

The Customer Experience Secrets of Companies You Haven't Heard Of (Yet).

An McorpCX Best Practices Webinar: How lesser-known CX leaders drive engagement and beat the competition, and what they have in common that any company can learn from.

August 28, 2018



Your Hosts:



Michael Hinshaw

Founder and President
McorpCX

- On multiple “Global CX Thought Leaders to Watch” lists, and a Top 10 CustomerThink columnist
- 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



Graham Clark

Director, Digital Experience
McorpCX

- Former global head of Digital, Digital Experience and Multichannel CX at Isobar, NIIT & Mphasis
- Creator of Digital Customer Company and Digital E3 (Emotional/Empathetic/Experiences) frameworks for Digital Operating Models (DOM)
- Fortune 50 leadership to startup entrepreneur, founding 5 digital companies

McorpCX: Better CX for leading brands, across industries



Driving significant, measurable ROI for our clients:

16% decrease in operating costs

Boost employee loyalty by over 200%

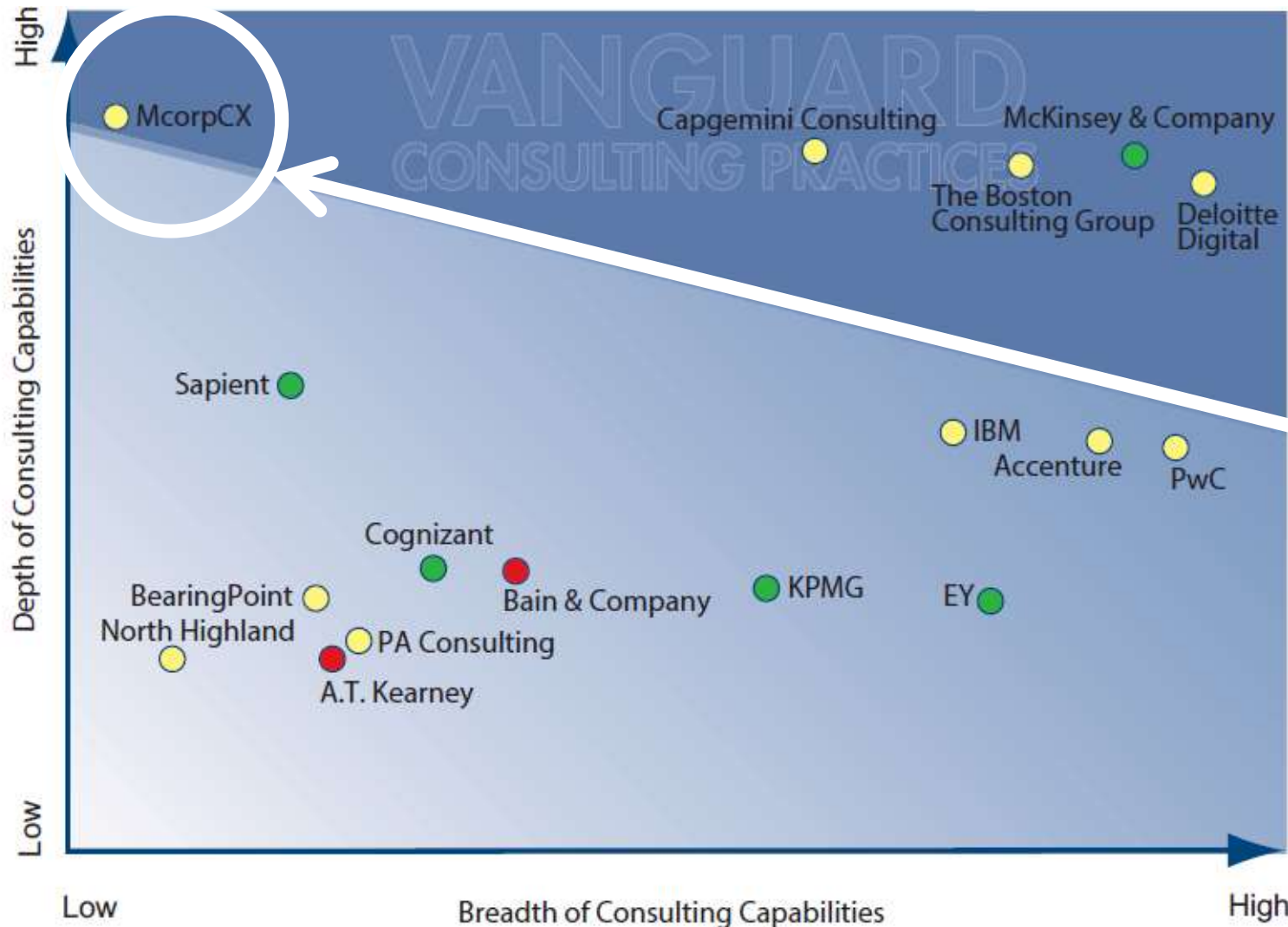
Overall Customer Satisfaction up ~400% (from 21% to 79%)

Greater top-line revenue, such as ~\$25.8 million/10% annually

150% better CX in target journey stages (+44% for the entire journey)

Reduce time-to-market for new services from 90 days to 7

Independently ranked Top 20 Digital CX+Strategy Leader

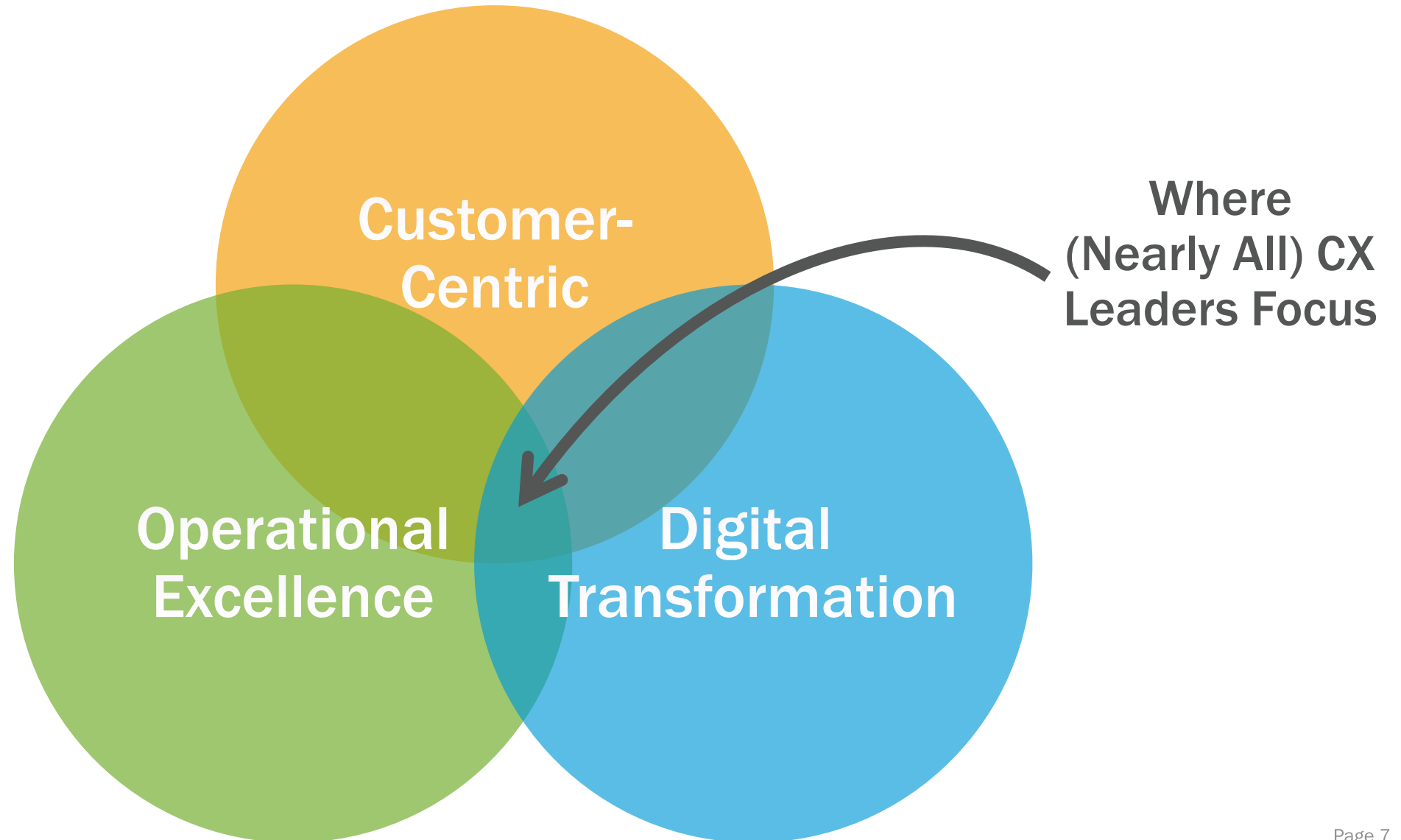


“[Their] narrow but deep market position enables McorpCX to effectively serve both the SME market and the largest global corporations”¹

-- ALM Intelligence:
The Kennedy Vanguard

Today, we're going to: Learn three things most CX leaders do today;
Meet a few leaders you may not know (yet); Highlight five other things they do to lead their markets;
Answer some of your questions...

Most CX leaders have these three things in common...



Commit to Customer Centricity

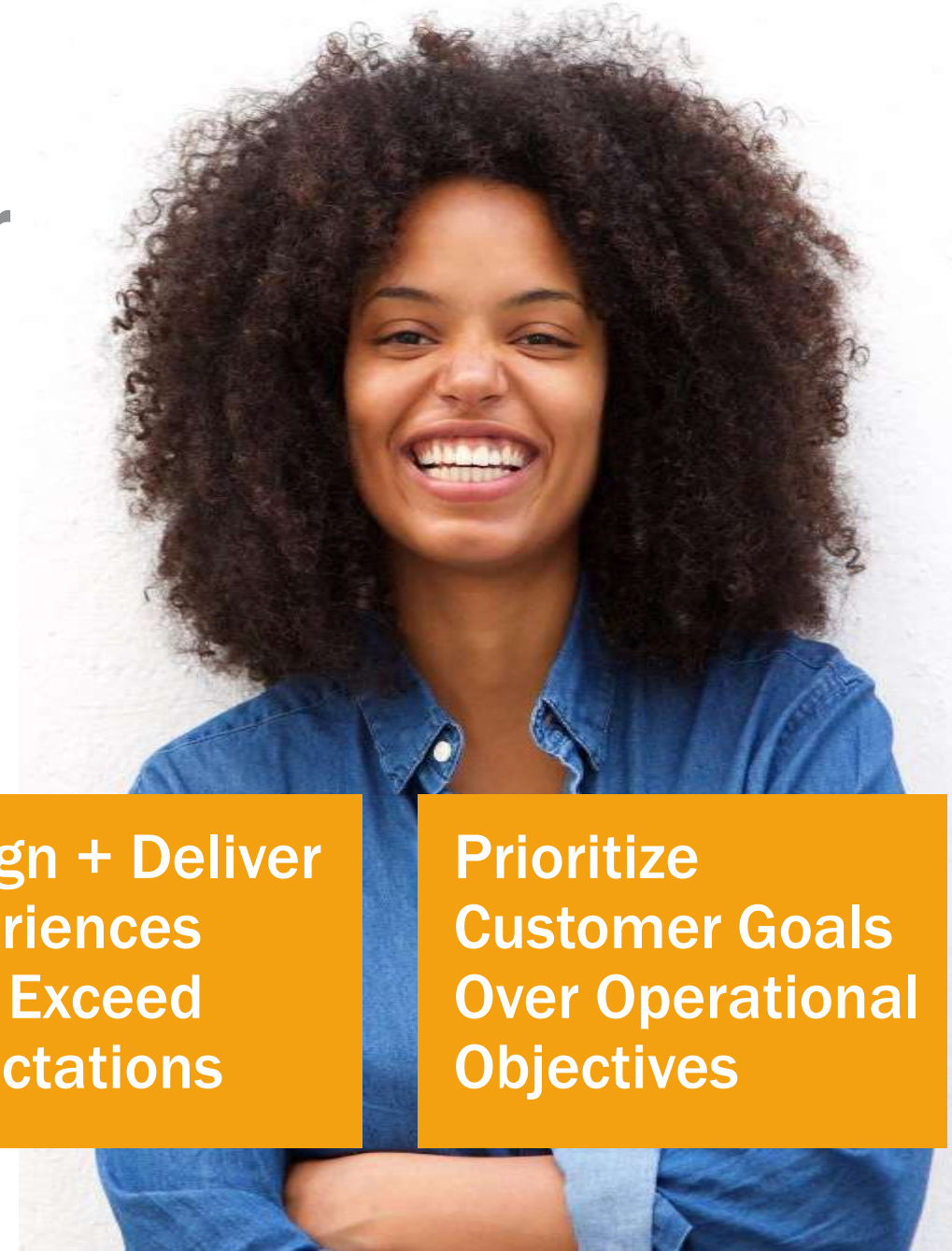
“Putting the customer at the center of decision making, and your business...”

Know Who Your Customers Are (And Who They Aren't)

Deeply Understand Your Customers

Design + Deliver Experiences That Exceed Expectations

Prioritize Customer Goals Over Operational Objectives



Embrace Digital Transformation

“The use of technology to radically improve performance or reach of enterprises...to change customer relationships, internal processes and value propositions.”

- MIT Sloan Management Review

**Across the
End-to-End
Customer
Experience**

**Digitally-
Enabled
Products and
Services**

**Integrated
Data and
Information
Systems**

**Cross-Org
Analytics
and Metrics
System**

Focus on Operational (and Execution) Excellence

“Systematic, integrated and continual improvement of business and operational processes across revenue, cost, and risk...”



Build + maintain connections among all processes

Dedication to measurement systems and metrics

Optimize effectiveness of all resources (e.g. PPIT)

Demonstrate results in clear business and financial terms

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There are myriad companies leading CX in their part of the world. I'd like to introduce you to eight of them...

oscar

metromile

PAi
Retirement Services

DAVIDsTEA

WARBY PARKER

slack

DUTCH BROS COFFEE

yearup

WISTIA

Boden



Basecamp

REBECCA MINKOFF

Casper

Life
is Good

buffer

Making healthcare easy, accessible and affordable...

Just The Facts...

Sector:
Health Insurance

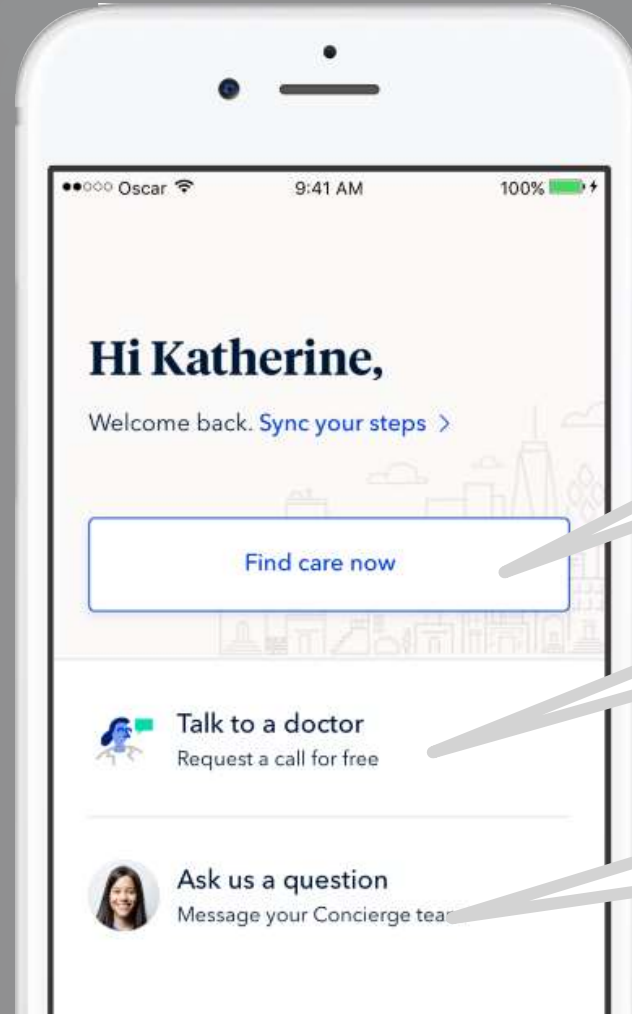
Size: **\$80M**

Employees: **760**

HQ Location:
New York, NY

oscar

What Matters Most to Our Customers?

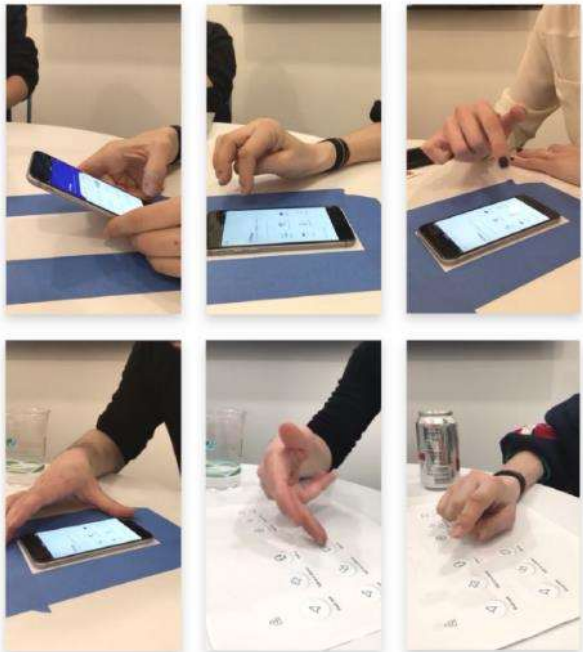


Something wrong?
Find care right away

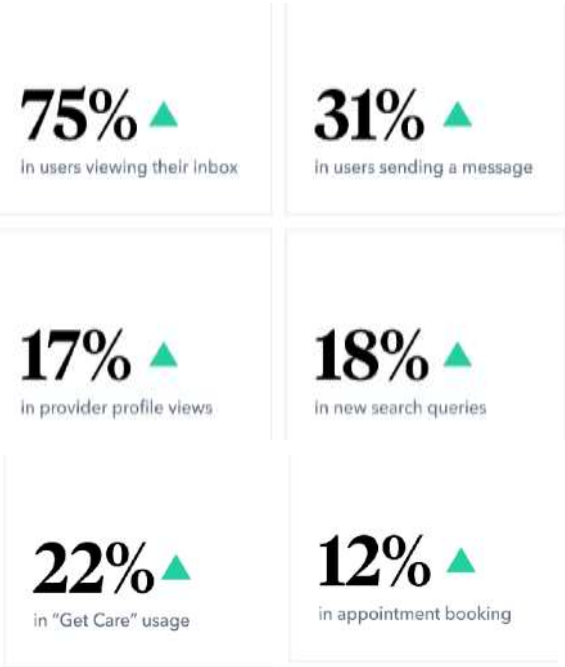
Talk to a Doctor
in 15 minutes,
24 hours a day
(every day). For free.

Talk to YOUR Health
Care Concierge

Oscar pro tips: Focus on customers, data and technology



Design Your Services,
Tech and Interactions
Using Real Customer
Feedback



Use Data to Actively
Prioritize, and
Inform Decision
Making



Encourage (and
Reward) Healthy
Behavior With a
Free Wearable Device

Making retirement planning easier, and more effective...

Just The Facts...

Sector:
Financial Services

Size: \$33M

Employees: **165**

HQ Location:
De Pere, WI



Traditional 401k Statement



Years of Retirement Tool



“Retirement is about years, not balances”

PAi pro tips: Employee focused and clear, shared values

“When Work Works”

A circular logo with a blue border. Inside, the words "EFFECTIVE", "BOLD", and "FLEXIBLE" are arranged in a semi-circle at the top. In the center, the words "WHEN WORK WORKS" are stacked vertically. At the bottom, the word "AWARD" is written in a semi-circle.

Family Friendly Workplace

A group of seven people, four women and three men, standing together and smiling. They are wearing name tags and some are holding a small award or plaque.

Best Place to Work

A man in a suit standing at a podium on a stage. Behind him is a large screen displaying the PAi logo and the text "Next Generation Best Place to Work WINNER".

“When you come to work, it feels like home away from home. The people here are like a family...”

Shared Values

CARE. Care about our customers.
KNOW. Know what they need.
DO. Do it.

Sharing a passion for tea: In-store, online, everywhere...

Just The Facts...

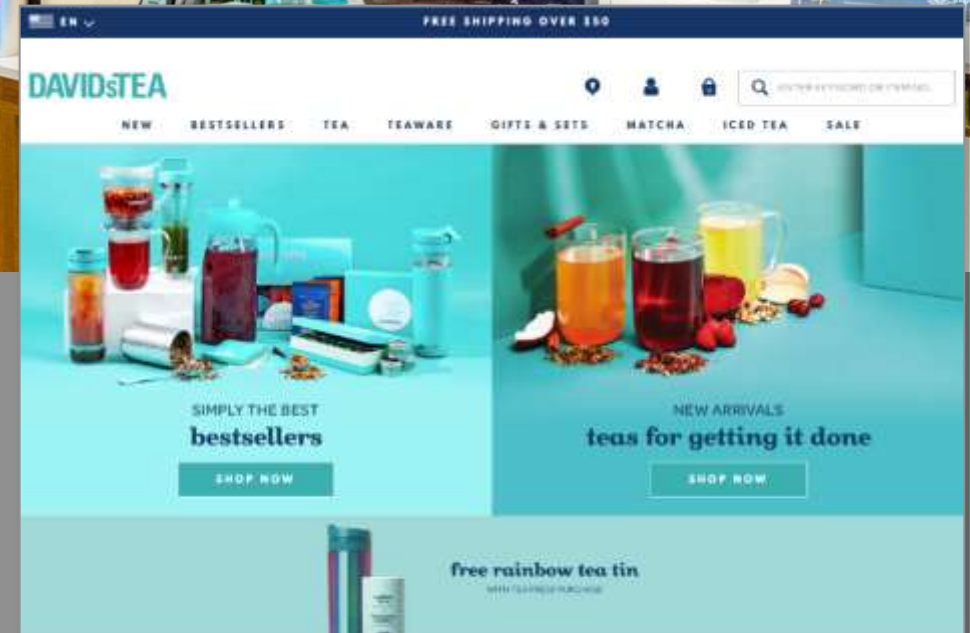
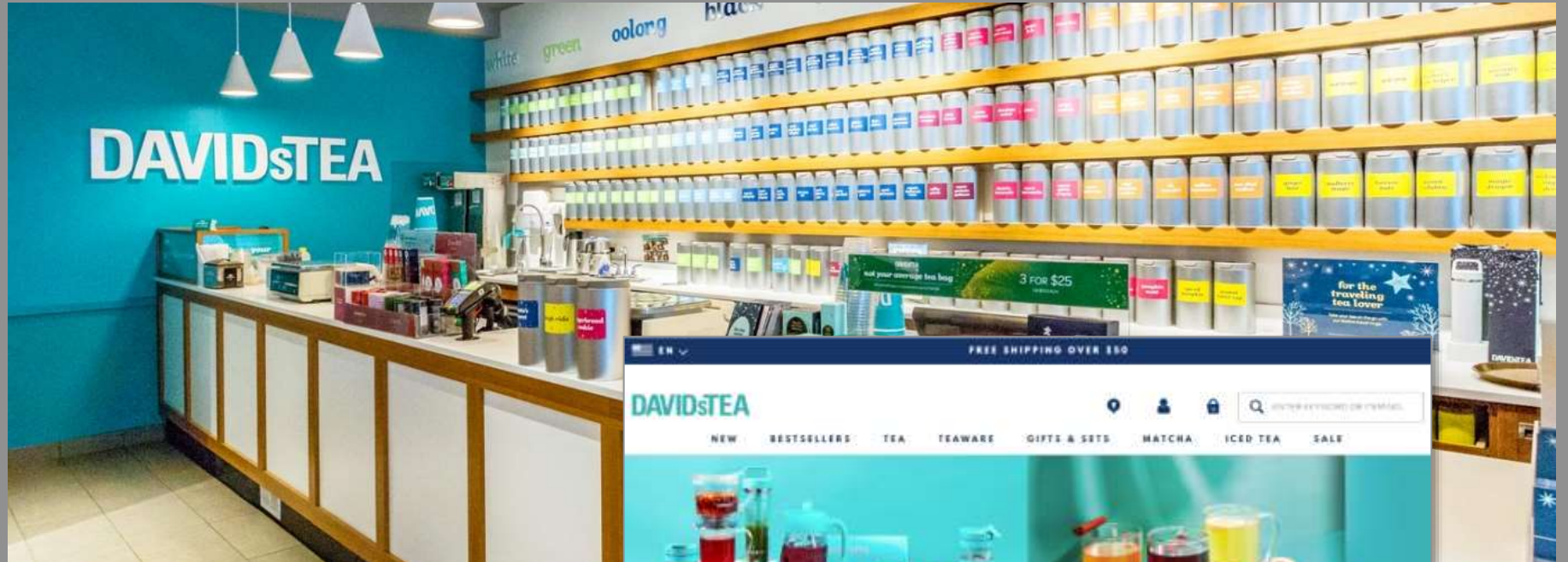
Sector: **Specialty Retail**

Size: **\$173M**

Employees:
300FT, 2,000PT

HQ Location:
Montreal, Québec

DAVIDsTEA



DAVIDsTEA pro tips: Marrying the physical and the digital

Hire Passionate,
Engaged Employees
Who Love Their Work



'Tea Guides' Passion
Is Contagious

Remove Barriers to
Trust in the Online
Channel



Understand the Risks
Your Customer is Taking

Leverage Data to
Enable Personalized
Recommendations



Helping Customers Make
Informed Decisions

Ease and affordable style for prescription eyewear...

Just The Facts...

Sector:
Specialty Retail

Size: ~\$400M

Employees:
~1,000+

HQ Location:
New York, NY

WARBY PARKER



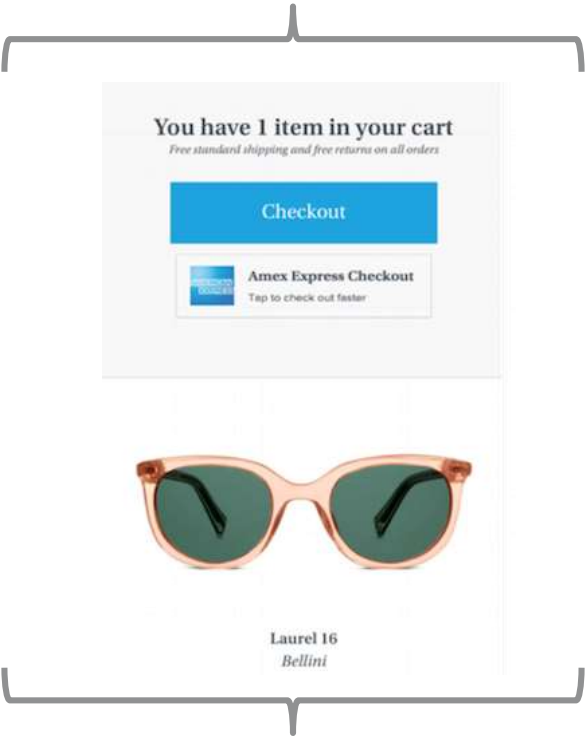
Warby Parker pro tips: Simplify systems and processes

Virtual AND In-Home
Physical Try-On of Your
Favorites



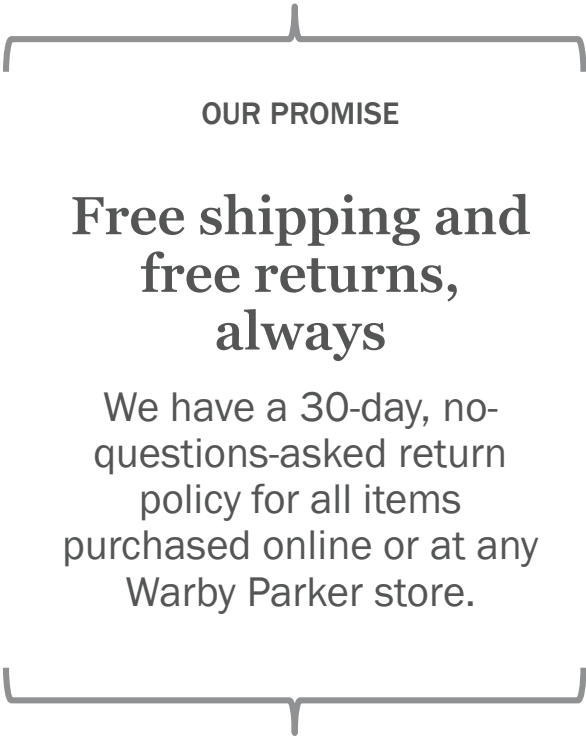
Remove Barriers to
Purchasing Online

Don't Pay When You Buy
Your Glasses. Pay When
You Receive Them.



Make Decisions with
the Customer in Mind

Don't Like Them?
Or You Scratched Them?
No Prob: Send 'em Back



Remove Friction (and
Fear) from the Model

Changing the way people, teams and companies work...

Just The Facts...

Sector:
B2B Technology

Size: **\$200M**

Employees: **800**

HQ Location:
San Francisco



Success

Inc.'s 2015 company of the year (Now, with 8 million daily active users...)

Problem

“Email is a difficult way to manage people, teams and communications.”



What if you could centralize all communications and information in one (virtual) place?

Slack pro tips: Putting customers and experience first

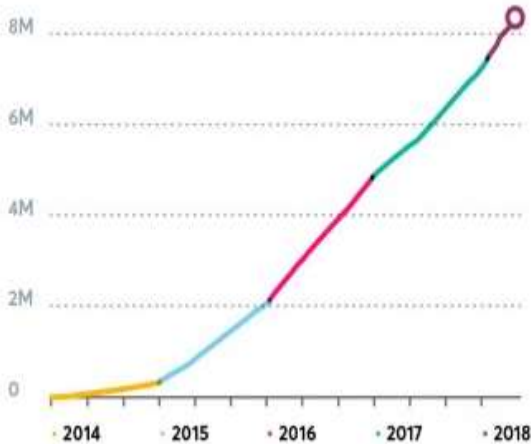


Make Active
Listening a Core
Competency



Hire for Personality
and Emotional
Intelligence

May 2018, 8 Million
Users. And No
Salespeople



Create Evangelists
(With an Experience
People Love)

Closing “the opportunity divide” in just one year

Just The Facts...

Sector:
Services

Size: **\$135M**

Employees: **825**

HQ Location:
Boston, MA



THIS IS THE OPPORTUNITY DIVIDE



**5 MILLION
YOUNG ADULTS**
are disconnected from
stable career pathways.

12 MILLION JOBS
requiring postsecondary
education will go unfilled
in the next decade.

Year Up pro tips: Measure progress, and success



Living your values, in all aspects of your business

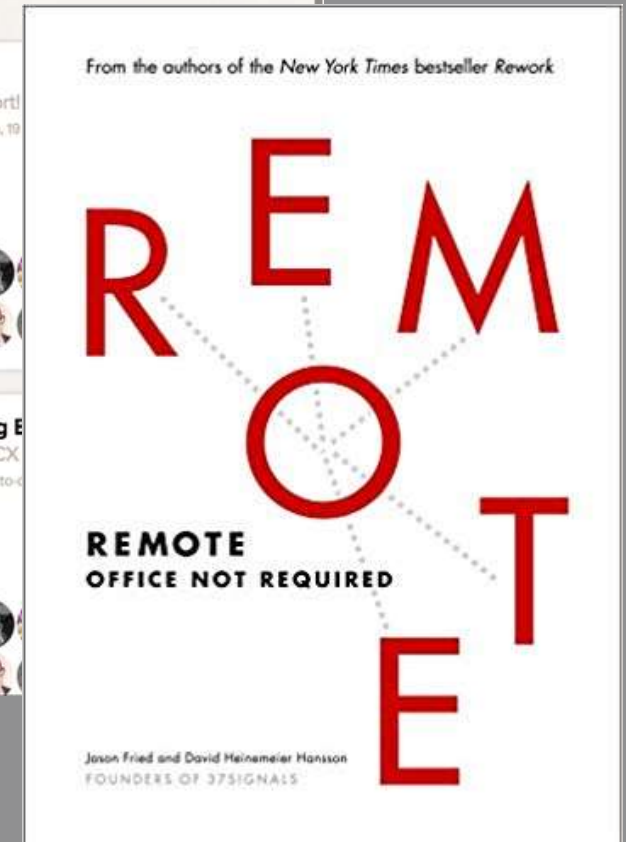
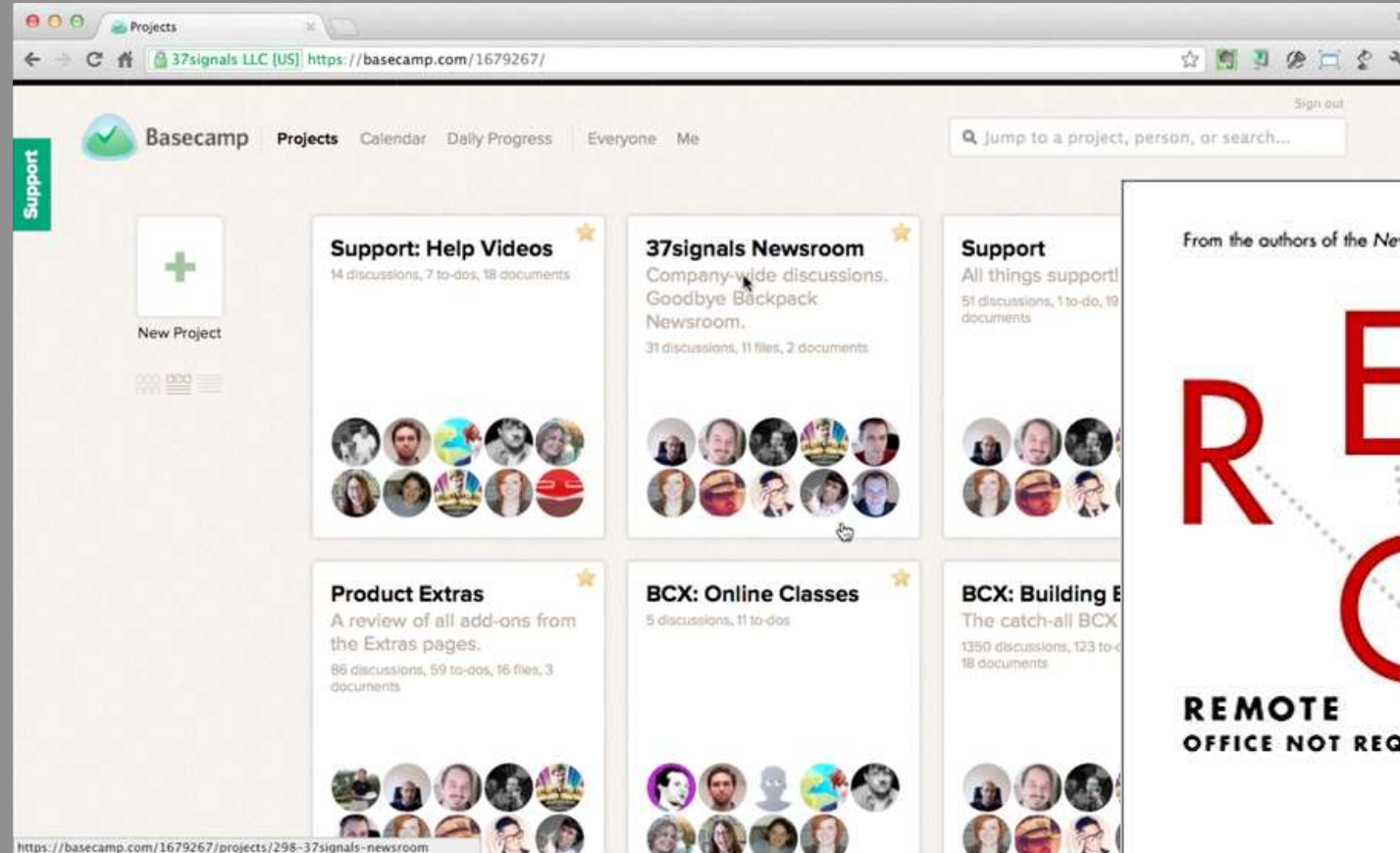
Just The Facts...

Sector:
B2B Technology

Size: **\$25M**

Employees: **52**

HQ Location:
Chicago, IL



Basecamp pro tips: Focus (on employees and customers)

Keep it
Simple

Eat Your Own
Dogfood

Value The People
Who Work With You

“Every bet
we’ve placed
on making it
easier for our
customers
has always
paid off.”



Simplifying (and demystifying) mattress buying...

Just The Facts...

Sector:
Specialty Retail

Size: **\$600M**

Employees: **300**

HQ Location:
New York, NY

Casper



Casper pro tips: Make sleeping (or not) easy and fun..



Decision Making
Criteria is Crystal Clear



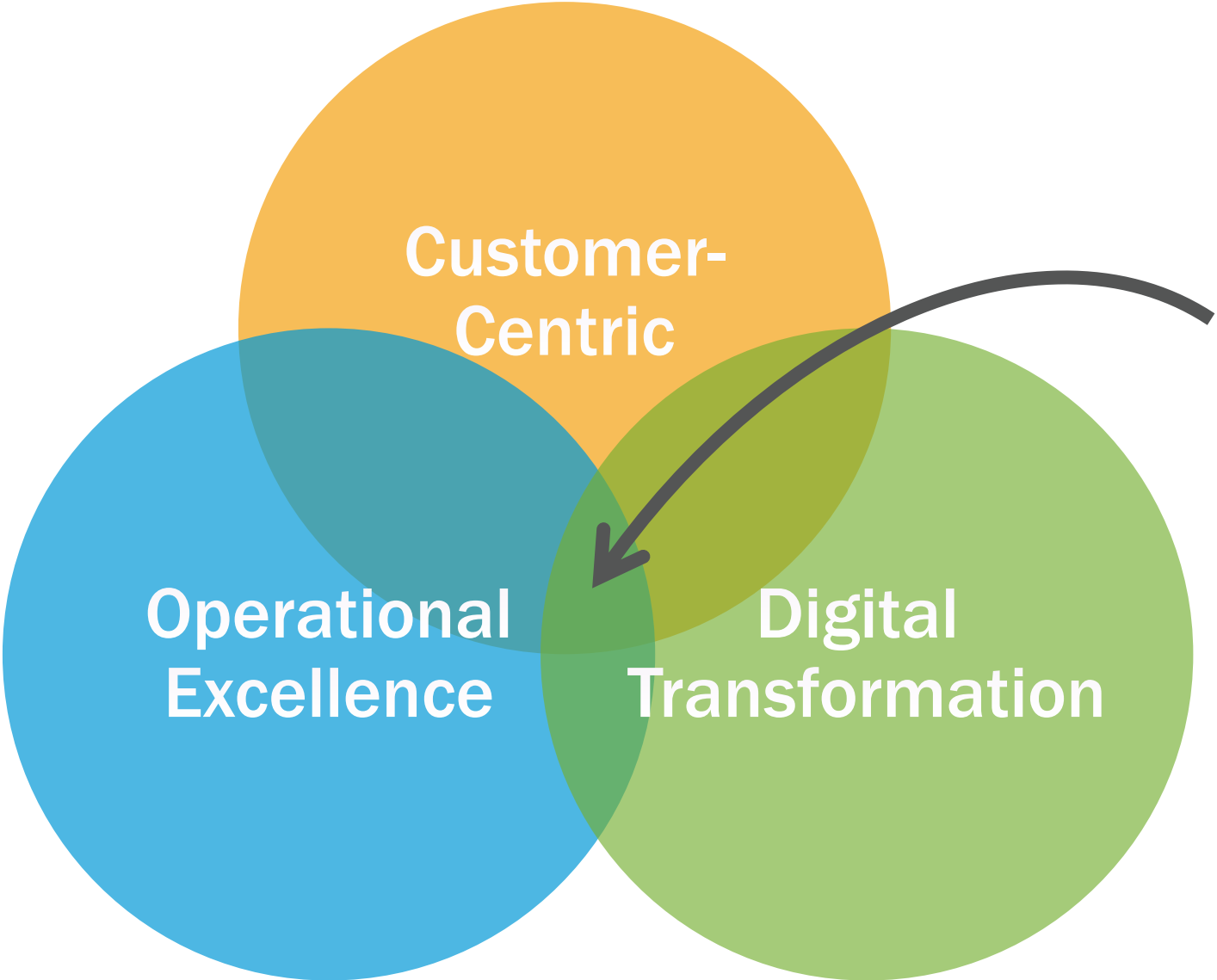
Can't Sleep? Meet
Insomnobot3000



Can't Sleep On It?
They'll Come Get It.

Today, we're going to: Learn three things most CX leaders do today; Meet a few leaders you may not know (yet); Highlight five other things they do to lead their markets; Answer some of your questions...

Five (more) things these leaders do that you can do, too!



Yes. These Leaders Focus Here. And...

One: Know (exactly) who your customer is...



Two: Embrace and improve employee engagement

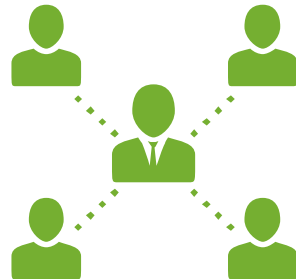
1.

Commit to fostering an engaged workforce



2.

Understand your employee experience, and how they feel



3.

Remove barriers to a better employee experience

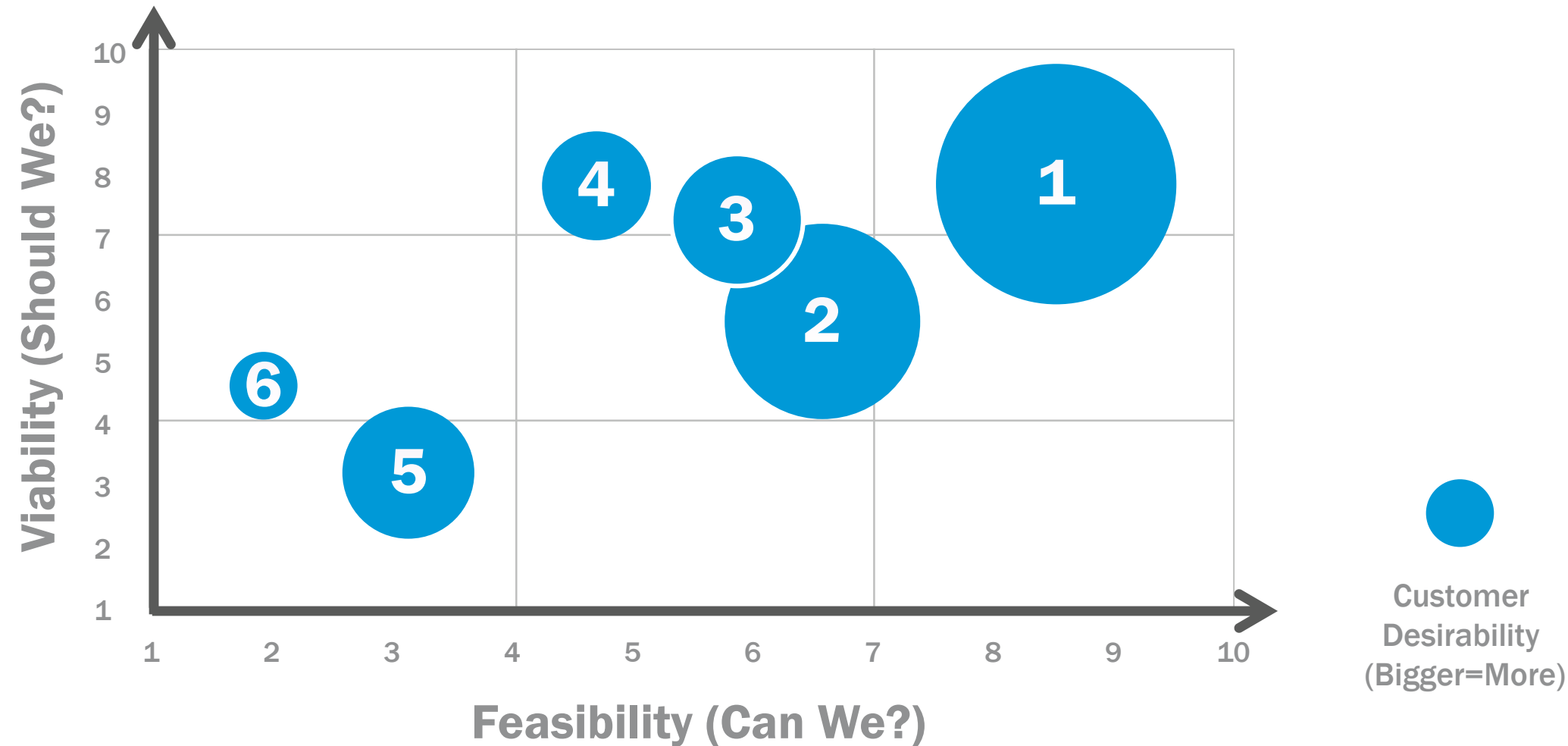


4.

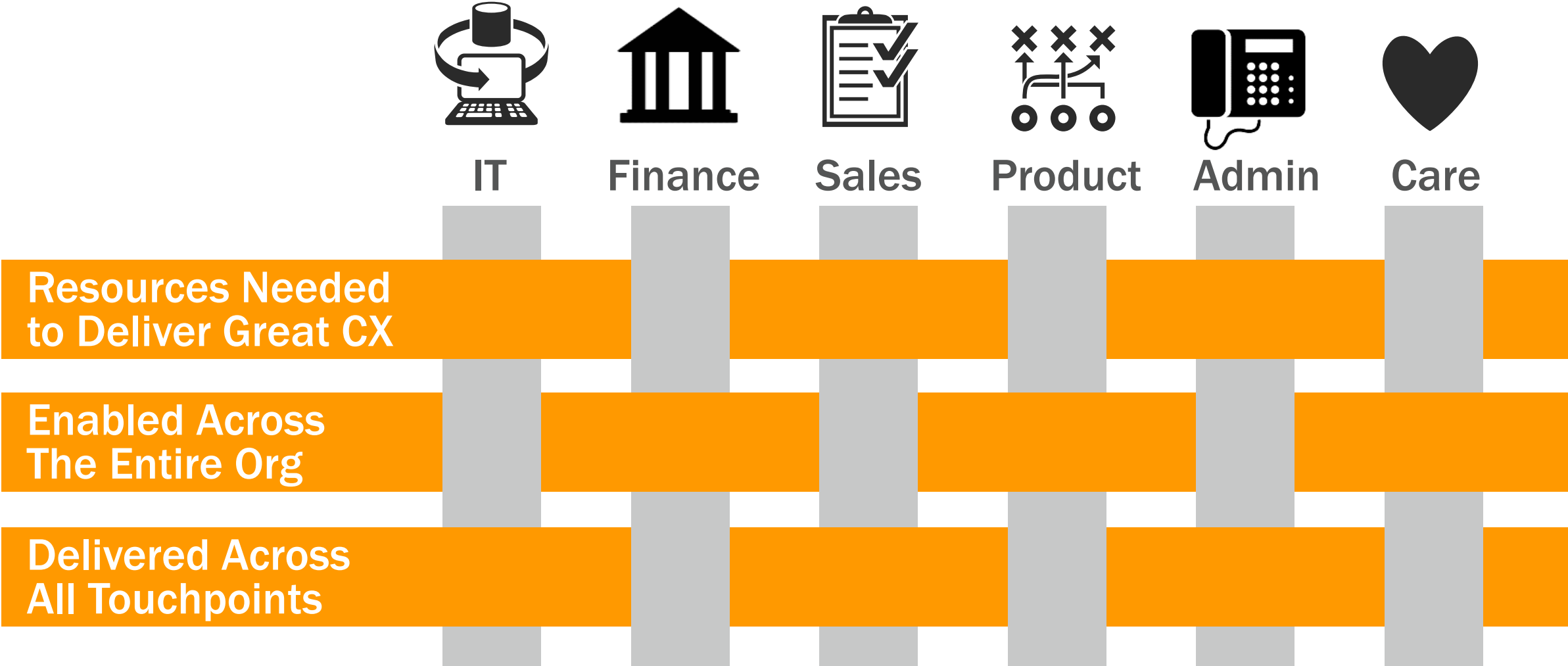
Make it easier for employees to do their jobs, and see results



Three: Focus and prioritize, informed by experience



Four: Actively Enable Customer & Employee Experience

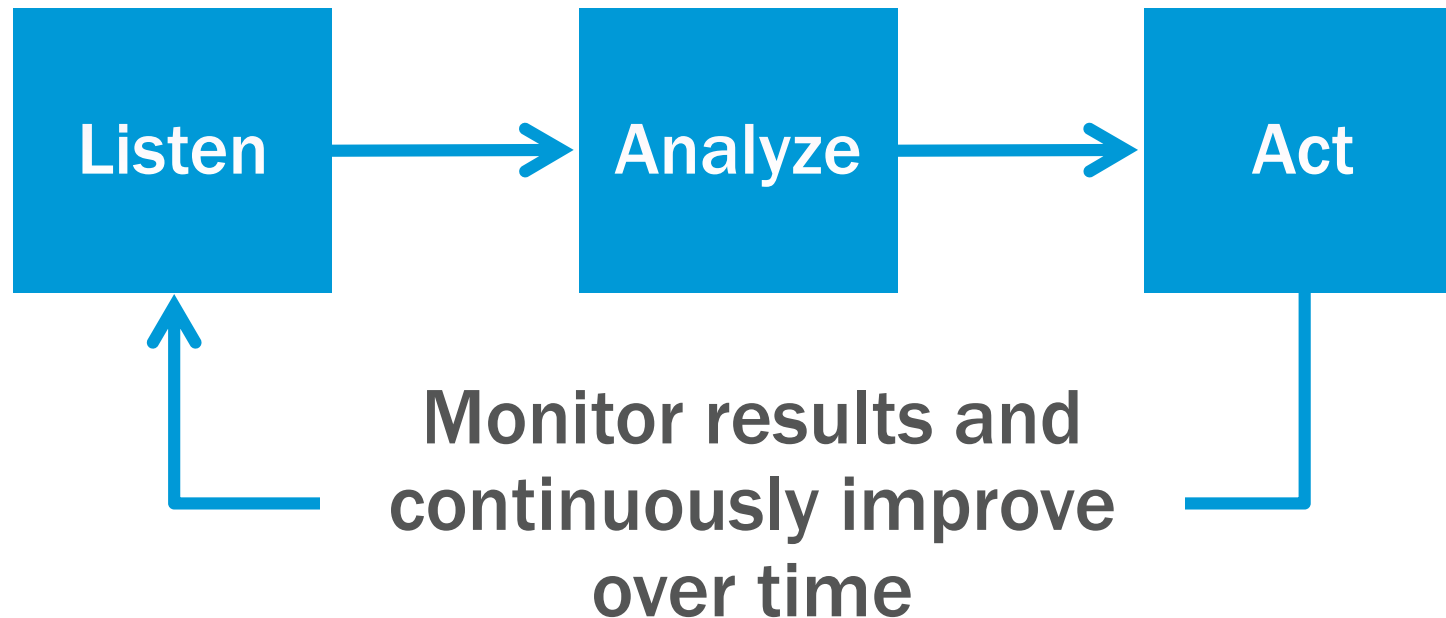


Five: Measure experience, and take action to improve

**Collect
feedback across
segments and
channels**

**Identify
insights, and
share across
the org.**

**Prioritize
and act on
improvement
opportunities**



Key takeaway: CX leaders of all sizes leverage similar principles to engage customers and drive value

**Know
(Exactly)
Who Your
Customer Is.**



**Focus and
Prioritize,
Informed by
Experience**



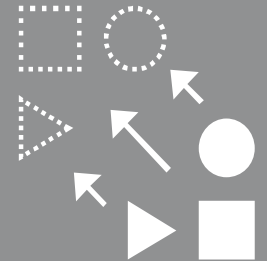
**Embrace
and boost
Employee
Engagement**



**Enable
Customer
& Employee
Experience**



**Measure
Experiences,
Take Action
to Improve**



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