

Operationalizing CX Series: Volume 1

Experience Strategy: 'North Star' Vision Development Playbook

Setting the stage for experience leadership
with a brand-aligned experience vision
and a strategy to bring that vision to life.

McorpCX is independently recognized as a top customer experience consulting and services company, enabling and guiding customer-centric organizations since 2002.

Whether your organization is just beginning its customer experience journey or is well down the experience transformation path, we are experts at driving experience-led business success in an increasingly customer-centric world.

Call 1-866-526-2655 or visit us at www.mcorp.cx to learn how we can help you and your organization get closer to your customers and profit as a result.

Contents

INTRODUCTION	2
The Best-Practice Capabilities of CX Leaders	
The Importance of Measuring Customer Experience	
CX VISION AND STRATEGY: THE BASICS	16
CX Strategy vs. CX Vision: What You Need to Know	
Experience Vision and Strategy: The Payoff	
Aligning Business and Brand Strategy to Experience	
DEFINE AND BRING YOUR CX VISION TO LIFE	22
Step 1: Strategy Alignment	
Step 2: Articulating Your CX Vision	
Step 3: Validate, Refine, and Finalize	
Step 4: Align Across Your Organization	
Step 5: Activate: Bring Your Vision to Life	
Step 6: Measure and Optimize	
WHERE TO FROM HERE	46
A Vision-Led, Customer-Centric Organization	
Proven Strategy Pillars to Consider	
Six Common Pitfalls to Avoid	
Getting Started: Key Considerations	
Glossary of Terms (Abridged)	

Introduction

The Best-Practice Capabilities of CX Leaders

Customer experience management. You might expect that this is a well-understood term. After all, like customer experience, it's used a lot. However—also like 'customer experience'—it's used to describe many different things.

So for the avoidance of doubt, we'd like to start this playbook with two definitions.

- **Customer Experience (CX):** How customers perceive their interactions with your company
- **Customer Experience Management (CXM):** The collection of capabilities and processes used to systematically design, deliver, and react to customer interactions

This is important to understand for a simple reason: To radically improve customer experience, you need to radically improve your Customer Experience Management (CXM) capabilities.

Which is why leading customer experience organizations—the top 20 percent of companies as measured by factors including CX scores, revenue and profitability growth, customer retention and profit—share a number of customer experience management capabilities.

When leveraged together, these capabilities—eight in total—can help any organization do a better job designing, developing, and delivering great customer and employee experiences.

“CX leaders share these eight common, proven, best-practice-based customer experience management capabilities.”

These best-practice-driven capabilities provide a roadmap or “CX Operating System” for scaling and systematizing customer experience management expertise.

The first capability and the focus of this playbook—Experience Vision and Strategy—delivers an enablement framework for activating a customer-centric operating model.

- **Experience Vision + Strategy:** Aligned to your brand and business strategies, this provides the “north star” for you to deliver on the expectations set by your brand.
- **Customer Understanding:** Deep insight into customer wants, needs, and perceptions provides the foundation for design and delivery of experiences that meet expectations.
- **Experience Design + Innovation:** This capability allows you to design products, services, and experiences that meet customer needs and differentiate your business.

- **Governance:** Despite its tedious overtone, oversight is critical to effectively prioritize investments, guide delivery, and hold the business accountable for improving the end-to-end experience.
- **Organization + Culture:** A customer-centered culture helps align the behavior of your people and the meaning they attach to those behaviors (e.g. rewards, social cues).
- **Measurement:** Gauging the CX metrics that drive business results is critical to understanding experience delivery and its impact on business performance.
- **Technology + Data:** Comprehensive tools that enable your organization to understand and distribute knowledge of your customers and to deliver and support customer experience.
- **Processes:** The systems your organization develops and enables that support the design, delivery, and management of customer knowledge, data, and experiences.

Developing better customer experiences requires:

Experience
Vision + Strategy

Audience
Understanding

Experience
Design + Innovation

Developing better customer experiences requires:

Governance

Culture

Measurement

Technology + Data

Processes

“Successful 21st century businesses are increasingly managed by data, not (just) intuition.”

Five Things CX Leaders Get Right

Developing a vision and strategy for customer experience can be difficult—if you don’t know where to start. The good news is there’s a proven path to success.

From articulating the experiences they aspire to deliver to prioritizing activities and allocating resources to make them real, CX leaders recognize the importance of getting their strategies “right” to ensure they do many things very well.

When it comes to their experience strategies and the vision they wish to enable, some of the most critical things these leaders focus on include:

- 1. Align with their business and brand strategies:** Though we just touched on this, we cannot stress enough the importance of getting this right.
- 2. Define the experiences they plan to deliver:** Leaders articulate their strategies, defining the customer experiences they plan to deliver and to whom.
- 3. Guide how people behave and how systems work:** Leaders guide how their people behave and how their systems, processes, and activities enable them to deliver the experiences they wish.
- 4. Guide prioritization and decision making:** Critically, their customer experience strategies inform the prioritization and use of resources, guiding the allocation of the resources to design and deliver the intended experience.



- 5. Periodically review their CX Strategies:** While many leaders formally review their strategies every 3 years or so, some conduct more responsive agile strategy reviews as they track market, customer, and competitive changes.

These are the major success factors we’ve seen drive internal change, boost market differentiation, and accelerate time-to-value on customer experience investments.

We know this because we’ve helped articulate and activate CX Strategies for leading technology, financial services, and retail companies, among others.

On the pages that follow, we’ll talk about how these leaders got there and how you can get there, too.

For nearly 100 years Sears dominated mail-order, in-store experiences and more—but missed the digital, mobile, and social media-driven revolutions.

When to (Re)asses and (Re)define Your CX Strategy

In business as in life, nothing remains static. Markets transform, technology disrupts, and customers, employees, and competitors change.

Companies need to assess the impact of these changes on their business and their CX strategies and react. Leaders keep an eye on these 5 things and respond accordingly:

- 1. Customer Expectations:** Customer wants, needs, and expectations continuously evolve and change, driven over the last decade or so by digital adoption and always-on access, increasing awareness of what's possible.
- 2. Business Strategy:** When a company enters new markets or launches new products, this can fundamentally shift the CX strategy. Whether strategy changes affect existing customers or you enter new markets with new customers, it's critical to align your strategies to what customers want.
- 3. Technology Capability:** Technology and digital capabilities are continuously evolving—and with this, companies need to evolve to take advantage when they do.

From the impact of IoT and environmental sensing (Google Nest), interactive speech (Siri and Alexa), and API ecosystem models to the new CX tech innovations of Artificial Intelligence (AI), Machine Learning (ML), Robotics, and Virtual and Augmented Reality, you need to review and understand what they do and be ready to change if needed.

4. Increased Organizational Awareness: Sometimes CX strategy is redefined just because the organization gets smarter about customer wants and needs, or employee attitudes and expectations change in ways that create a need for a CX Vision to inform and guide behaviors. Leaders are constantly looking at everything.

5. Competitive Disruption: Markets and competitors change. When they do, it's important to assess your strategies and respond accordingly. Examples abound of companies that didn't.

How might you have reacted if you thought about implications to your business of Uber leveraging the technology capabilities of mobile phones, GPS, and internet payments? Or how E*Trade's focus on low-cost, self-directed internet-enabled trading? Or how Esurance sold insurance directly to consumers? Leaders recognize that competitive disruption doesn't always come from direct competitors.

6. Strategic Exhaustion: Sometimes, what's worked in the past just isn't working anymore. Recognizing and addressing this can help revitalize customer relationships and drive greater employee engagement.

“A defined experience strategy delivers differentiated experiences with a clear, well-understood plan to position, design, and launch them.”

CX Strategy: An Enablement Framework

What exactly is a customer experience strategy? Spend any time online trying to answer this question and you’ll see how easy it is to become overwhelmed with well-meaning but (in some cases) radically misinformed customer experience strategy definitions.

The issue isn’t that the answers aren’t out there—they are. But, as the saying goes, it’s hard to sort the wheat from the chaff.

Among other things, customer experience strategy isn’t the same as customer service. It’s not part of a holistic customer journey strategy. Nor is it the same thing as customer experience (CX).

What it *is* is a framework for bringing your customer experience vision to life. It’s a way to help your company systematically make decisions that allow you to consistently meet and exceed customer expectations.

It’s your plan for serving and meeting the expectations of your customers, your employees, and other key audiences.

Customer experience strategies can of course encompass many different things and be defined in many different ways. It can be deep and wide or as simple as a defined vision of the experiences you wish to deliver and how you’ll do so.

It can be an organization-wide plan to shift culture and drive change or a back-of-napkin CX vision. You get the idea.

In our experience, successful CX design and delivery—done consistently and systematically at scale—is best served by a robust strategy that extends to and is tightly linked with CX activation, execution, and management.

No matter what your aspirations for customer experience may be, one thing is certain: without a strategy for bringing that experience to life and managing it over time, the chances are exceedingly low that you’ll be able to consistently deliver on customer expectations of your brand.

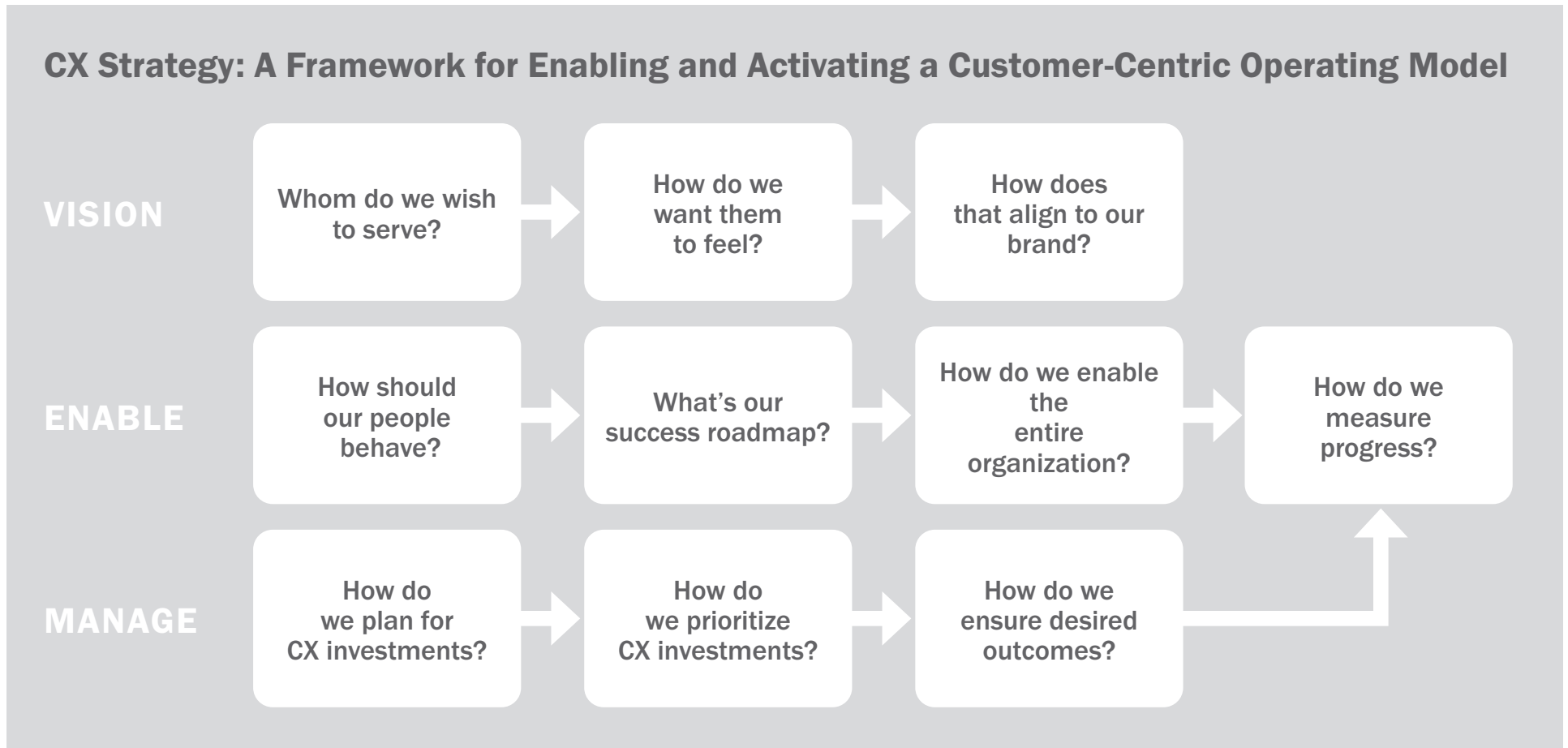
Ultimately, without a customer experience strategy, the chances of losing your customers to the competition are exceedingly high.

“If you don’t know where you are going, you’ll end up someplace else.”

– Yogi Berra

“If you don’t know where you are going, any road will get you there.”

– Lewis Carroll



Organizations striving to significantly improve customer experience need a plan to do so. That’s because great customer experiences don’t just happen. They’re designed.

This is where your customer experience strategy comes into play. It’s a framework for bringing your CX vision to life, enabling you to design and deliver the experiences your customers want.

“Without a customer experience strategy, the chances of losing customers to your competition are exceedingly high.”

The three primary characteristics of winning customer experience strategies—along with some questions to ask and answer to help bring your CX strategies to life—include:

1. Vision: Articulating the experiences you plan to deliver.

Who are your customers, and what are the kinds of experiences you wish to deliver them?

- To ensure a shared understanding of the people you serve, can you describe and prioritize customer groups and target segments?
- How do you want them to feel after they interact with your organization?
- How does this vision align to your brand? Will it allow you to consistently deliver on the expectations set by your brand and the promises it makes to your key audiences?

2. Enable: Guiding your people, systems, and activities.

Knowing the people you serve and how you want them to feel, how can you consistently deliver this?

- How should your people behave and what characteristics or attitudes should they display?
- What’s your roadmap for implementation and ongoing improvement?
- How can you infuse the strategy across the organization and embed it in your culture?
- How do you measure progress against your aspirations?

3. Manage: Informing the prioritization and use of resources.

How do you ensure you’re focused on the right things—and how can you prove it?

- Given your desired customer experience, how do you best allocate resources to design and deliver it?
- How do you plan for, prioritize, and rationalize the value of CX investments?
- How do you ensure—and report back on—your progress and achievement of desired outcomes?

CX Vision and Strategy: The Basics

CX Strategy vs. CX Vision: What You Need to Know

All-up, customer experience strategy defines your vision for the experiences you plan to deliver customers and helps your company systematically make decisions so you can consistently meet and exceed customer expectations.

While your vision is part of your strategy, they're not the same thing. Specifically:

- **Experience Vision:** Articulates who you'll serve and how you want them to feel—aligned to your brand in ways that meet the expectations of your customers, employees, and other key audiences.
- **Experience Strategy:** Your plan for bringing the vision to life by guiding your people, activities, and systems and for informing the prioritization and use of resources with your customer in mind.

Together, a clear vision and defined strategy to bring it to life create the foundational, best-practice capability of virtually all customer experience leaders.

That's where this guide comes into play.

In it, we outline specific steps that executives, business leaders, and CX professionals can take to develop their experience vision, align it with their brand, and use it to successfully deliver differentiated experiences that help them win and grow,

“It’s easy to waste time, resources, and effort on the journey to becoming more customer-focused without a clear direction and explicit details for getting there.”



Experience Vision and Strategy: The Payoff

Unfortunately, many customer experience vision and strategy-related efforts don’t deliver the desired results.

There are many reasons for this, not least of which is the fact that it’s easy to waste time, resources, and effort on the journey to becoming more customer-focused without defined details and clear direction.

In other words, it’s hard for companies to bring their experience vision and strategies to life. But for those who do, the payoffs are great. Among other things, together, they...

- Help you align your business and brand strategies;
- Provide the tools to consistently meet customer, audience, and employee expectations of your brand;
- Provide an organizational ‘North Star’ to focus and inform the design and delivery of experiences;
- Allow you to articulate and understand the customer experiences you plan to deliver;
- Help guide the prioritization of your people, systems, processes, and activities through a customer-centric lens.

On the pages that follow, we step through the process we’ve developed over the last 15 plus years helping some of the largest brands in the United States—and several global leaders—define and bring their experience vision and strategies to life.

“It’s hard for companies to bring their experience vision and strategies to life. But for those who do, the payoffs are great.”

Aligning Business and Brand Strategy to Experience

At its core, your CX strategy—and the CX vision that it enables—helps your organization to deliver on your experience aspirations across all aspects of your operating model. And all of this is in service to your business strategy.

Simplistically, your competitive business strategy or ‘value discipline’ is your plan for competing in the market and optimizing your financial performance within the context of your business model.

It’s what drives your economic engine and helps you prioritize and compete more successfully. Think Walmart and delivering customer value. Or Apple and innovation.

Your brand strategy, on the other hand, describes what you stand for and informs how you position, communicate, and compete in the market. Successfully executing your brand strategy helps you to achieve the goals set forth in your business strategy. It makes explicit promises to your customers and sets expectations of your brand and what it means to them.

And this is where CX strategy fits.

In brief, it’s your plan for fulfilling the promise your brand makes to your customers, for meeting customer expectations of your brand, and for doing so consistently across all aspects of your business.

Experience Strategy Enables Experience Vision: Aligned with your brand and your business purpose, experience strategy enables you to bring your vision to life, meeting the expectations your brand sets.



Microsoft

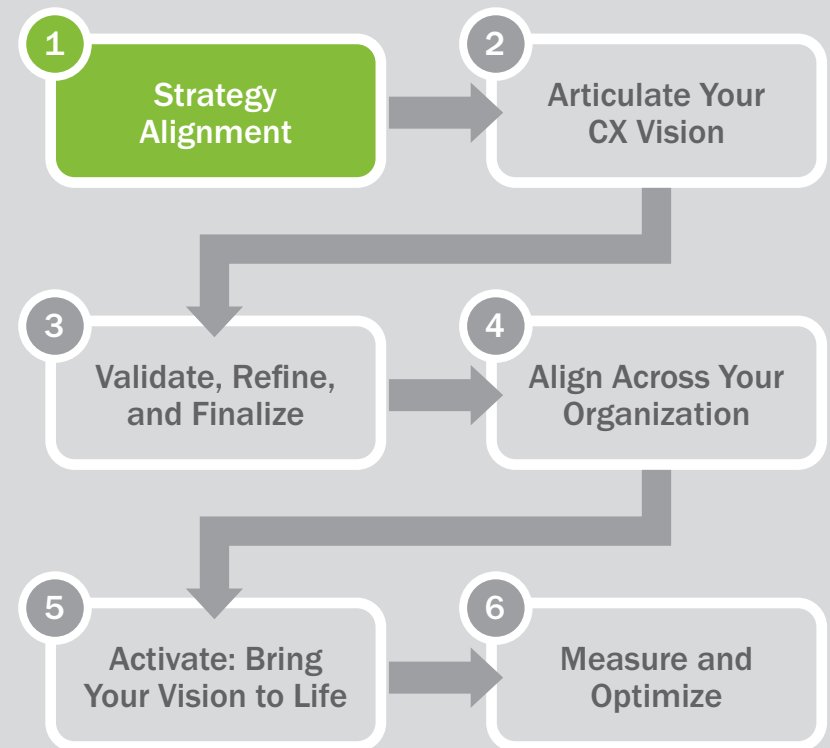
Product leadership (Innovation)	Our brand promise is to empower every person and organization on the planet to achieve more	Empowered to do more by accelerating the value imagined and realized from their digital experiences	By delivering experiences that feel human, connected, and intelligent
---------------------------------	---	---	---

Amazon

Customer Intimacy (Customer-Centric)	Our vision is to be earth’s most customer-centric company	Customers will expect products and services to be perfectly targeted to their needs	To create a personalized experience driven by innovation and delivering the best total value
--------------------------------------	---	---	--

Define and Bring Your Experience Vision to Life

Step 1: Align Your Business and Brand Strategies



Your Experience Vision is grounded in how you compete and the promises your brand makes to your customers.

Introduction

Understanding what stakeholders believe your organization can accomplish by developing a CX vision and strategy is a crucial first step in this process. While you shouldn't expect complete alignment, it will give you direction and provide guidance.

From here, the first steps for developing a customer experience vision and aligning it with your brand means determining two key things:

First, what is your competitive business strategy?

The answer to this question lies in understanding which of three core competitive strategies your organization embraces. With more detail in the books mentioned below right, they include:

- Cost Leaders and the Discipline of Operational Excellence: Compete primarily on their ability to deliver the lowest prices
- Differentiators and the Discipline of Product Leaders: Compete on innovation with products and services that “wow”
- Segmentors and the Discipline of Customer Intimacy: Compete by focusing on specific, targeted market needs

Second, what is your brand strategy?

The answer can be found in your mission and values, articulated brand promise, and attributes.

Together, these will serve as a foundation for the experiences your vision will articulate, driven by the promises your brand is making to your customers—and their expectations as a result.

Questions to ask:

- What is our topline competitive business strategy?
- What do customers expect from us based on the promises our brand makes to them?
- How will we use a CX vision and strategy to drive clear, measurable business results?

Pitfalls to avoid:

- Thinking of strategy in a non-holistic or siloed manner.
- Not linking strategy to organizational vision, mission, and values.
- Thinking that you have more than one primary competitive strategy.

Actions to take:

- Interview key stakeholders and gain alignment with their expectations and desired results.
- Define and document your brand promise and attributes.
- Document and rationalize your competitive strategy.

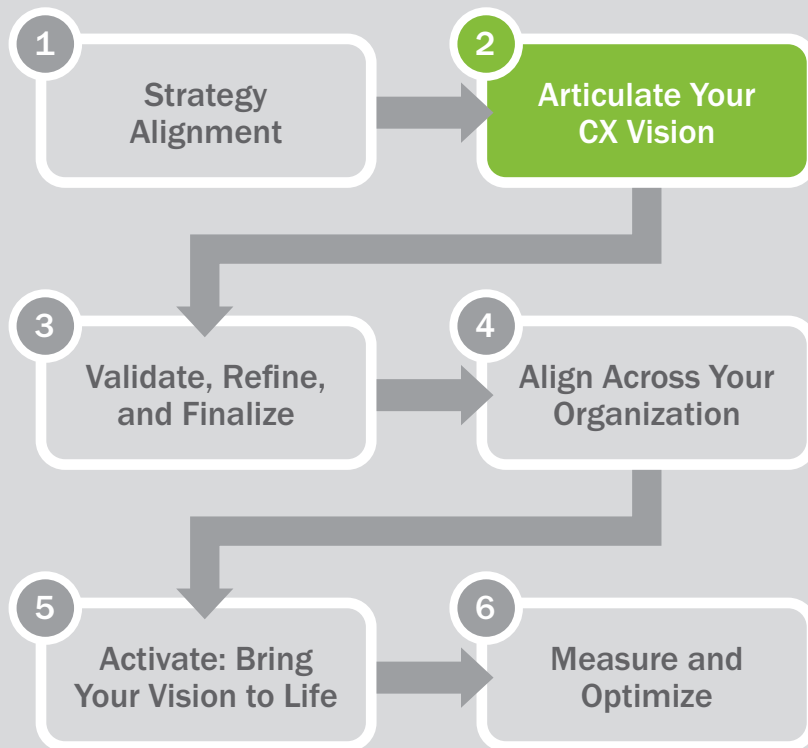
Wondering what your competitive strategy is?

Two books to read:

Competitive Strategy: Techniques for Analyzing Industries and Competitors by Michael Porter (1980)

The Discipline of Market Leaders: Choose Your Customers, Narrow Your Focus, Dominate Your Market by Michael Treacy and Fred Wiersema (1995)

Step 2: Articulate Your Experience Vision



Introduction

Your customer experience vision defines what experiences you will design and deliver to your customers and guides how your people will deliver those experiences.

This part of the exercise is as much art as science. But at heart it ladders up to your brand promise and resulting customer expectations and articulates the customer experiences you plan to deliver. With that in mind, here are some examples:

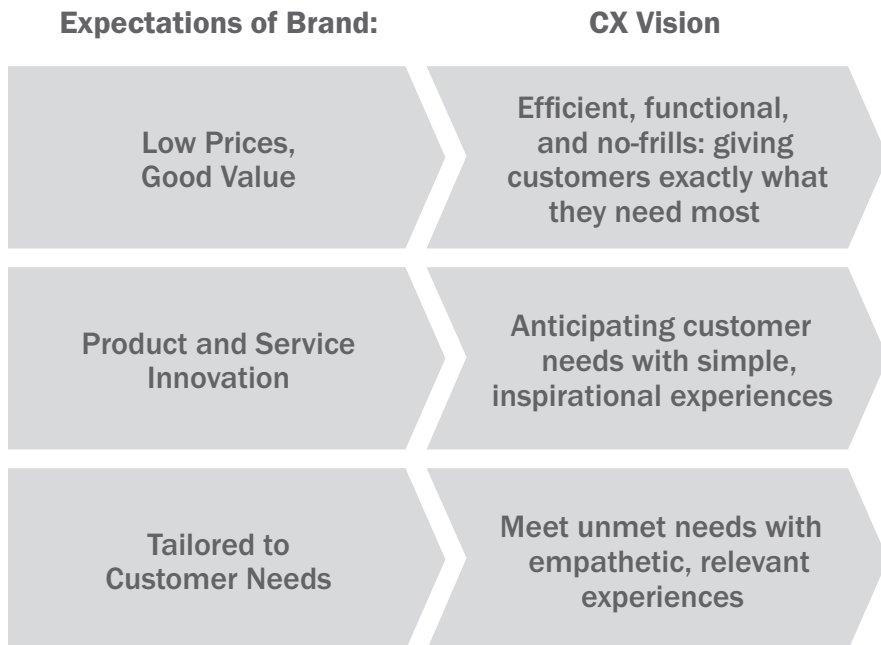
- Your promise is “saving people money so they can live better” (Walmart), and your customers might expect experiences that:
 - Provide real value
 - Are easy and convenient
 - Show you care about their customers
- Your promise is “think different” (Apple), and your customers may expect products and experiences that are:
 - Continually innovative and leading edge
 - Simple and intuitive
 - Exceptional at every point of interaction
- Your promise is “going above for those who have gone beyond” (USAA), and your members might expect experiences that:
 - Are uniquely tailored for or personalized to their needs
 - Create a sense of community or belonging
 - Are genuinely human and empathetic

“Your experience vision articulates the customer experiences you plan to design and deliver.”

Questions to ask:

- Will this help us deliver truly differentiating experiences?
- How will this CX vision inspire and guide our people?
- Will this “North Star” bring our brand and experience to life, bridging the here-and-now and the future we aspire to?
- Would it be easy for our competitors to copy us?

CX Vision Examples: These examples are of CX Vision pillars we’ve used with various organizations. As you can see, there’s no one right answer. But whatever your CX Vision is, it must be true to your brand, your culture, and the experiences your customers expect.



Pitfalls to avoid:

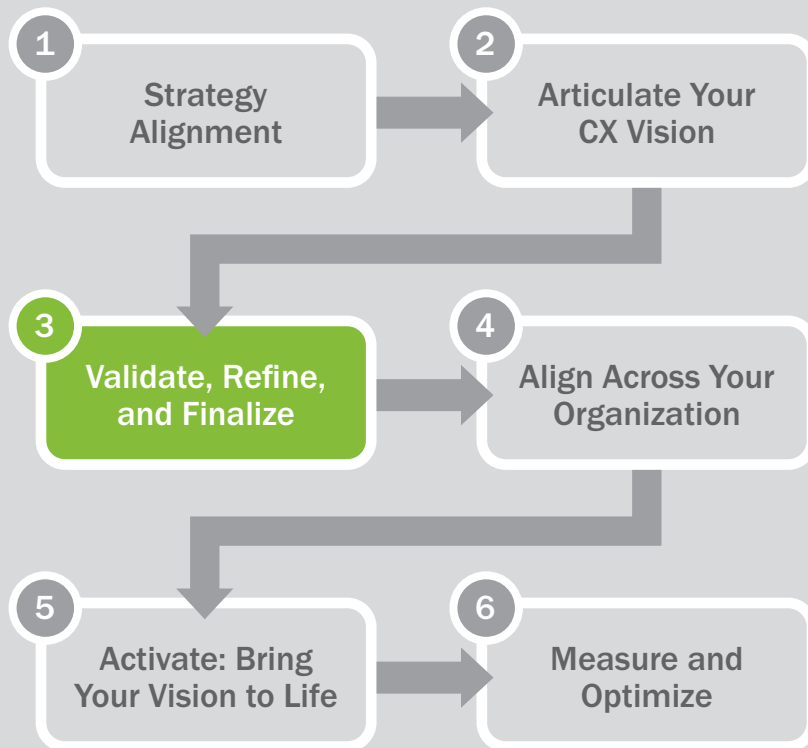
- Articulating something so aspirational it can’t be delivered.
- Building your vision without cross-organizational inputs, including stakeholders, leaders, and front-line employees.
- Not translating your vision to employee actions.

Actions to take:

- Understand the kinds of experiences your brand promises.
- Build a defensible first draft of your CX Vision, but don’t fall in love with it as it sits; validation and refinement come next.
- Use simple terms that everyone can understand.



Step 3: Validate, Refine, and Finalize Your Vision



Introduction

Congratulations! You've successfully created the first draft of your Experience Vision—a shared view that articulates the kinds of experiences customers will have as a result of interacting with your brand.

Now it's time to validate, refine, and finalize your Vision.

One successful method we've seen is to validate with small cross-functional stakeholder teams, then externally with customers to then build broader understanding and buy-in internally.

While the depth and breadth of this research-based validation work is variable depending on your organization, it's important to focus on the key objectives of the exercise:

- **Validate externally with customers:** It's critical to understand how your customers will feel as a result of your vision and related actions and to ensure that these feelings align with their expectations of your brand.
- **Validate internally with stakeholders and employees:** Leaders must understand and align with the vision to champion it and to drive initiatives to support organizational adoption. And employees must be able to understand and deliver on the behaviors your vision articulates.
- **Refine and finalize the CX Vision based on this feedback:** To ensure your final vision aligns to your brand and accomplishes your goals, use what you learn from external and internal research to assess and implement changes.

“Listening to and understanding external customer and internal stakeholder perspectives is the key to success.”

Questions to ask:

- How should we confirm our hypothesis? (e.g. Ability to differentiate, meet expectations, and drive our behaviors)
- What do our most important personas think? Why?
- What ‘level’ (depth and breadth) of validation does our organization require to buy into and support the vision?

Pitfalls to avoid:

- Not doing what it takes to really engage internally with your stakeholders, leaders, and front-line employees.
- Failing to test the vision with your customers and listen to them.
- “Falling in love with your initial vision”—stay focused, but don’t be afraid to make adjustments based on relevant feedback.

Actions to take:

- Do the research!
- Define organizational behaviors and employee actions.
- Bring stakeholders and leaders along; regularly communicate progress and share relevant insights.

Audience listening: How you validate your CX Vision

While there are many ways to approach this, here’s a 5-step process we’ve successfully used with many organizations.

Refinement of the Vision and employee actions occurs after each step, with the inputs carrying over into the next:

- 1. Stakeholder Alignment:** Small group, cross-organization (e.g. marketing, operations, IT, etc.) work sessions.
- 2. Qualitative Customer Research:** Interviews and/or online focus groups across key persona targets.
- 3. Executive Alignment:** Usually 1-on-1 conversations with senior executives (e.g. CEO, CMO, CIO, CFO, VP sales) to gain perspectives and drive understanding and buy-in.
- 4. Qualitative Employee Research:** Interviews and/or online focus groups across employee groups.
- 5. Quantitative Customer Research:** Assess differentiation across current and prospective customers to benchmark performance and inform activation.

As noted, these steps are variable based on your organization. We’ve seen some firms stop at step 3. Others have added quantitative employee research.

What works best for you is what works—provided you’re able to bring the organization along and ensure that where you end up will meet or exceed customer expectations.

Step 4: Align Your Vision Across the Organization



Introduction

The primary goal of alignment is exactly what it sounds like: to foster organization-wide support for the Vision.

Successfully bringing it to life means ensuring all employees know about it, understand their roles, care about it, and are well positioned to support and deliver it.

You've already begun the alignment process with stakeholders and executives. Now it's time to engage and align more broadly.

This includes frontline and customer-facing employees of course, plus "back-office" teams in finance, IT, and others who may not obviously impact the customer experience.

Because relevance and understanding drive alignment, our "standard model" includes translating the vision into role-specific behaviors and actions for three primary groups:

- **Direct:** Those whose actions directly impact the customer. (e.g. front-line staff, call center, sales, service, etc.).
- **Indirect:** Those who plan for, design, and/or build strategies to create customer experiences. (e.g. marketing, digital, retail operations, etc.).
- **Support:** Those who support the employees who deliver and plan the customer experience. (e.g. IT, Legal, HR, etc.).

With alignment on how different roles will support the vision in different ways, you can begin the process of communicating relevance and providing guidance across your organization.

“Alignment means ensuring all employees know about the Vision, understand their roles, care about it, and are well positioned to support and deliver it.”



Questions to ask:

- How do we translate each attribute of our vision into terms that are relevant for different roles?
- What are the best ways to bring all of our employees closer to our customers?
- How do we leverage our cross-organizational stakeholders to begin more broadly engaging others?

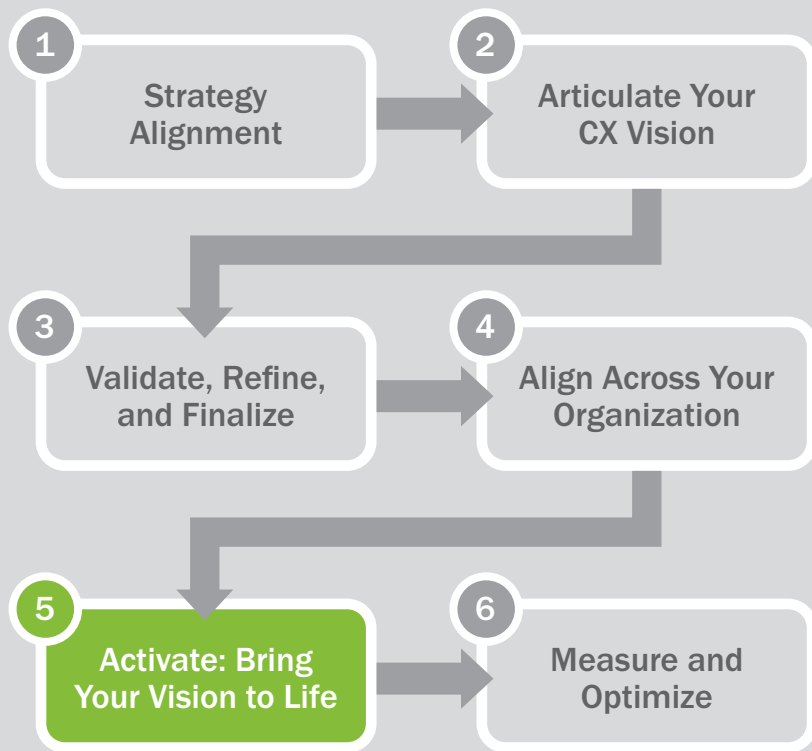
Pitfalls to avoid:

- Failing to articulate how customers (external or internal) will feel as a result of the experience being delivered.
- Moving away from the spirit or intent of the all-up CX vision when translating it for different groups.
- Making decisions about role-based definitions without input from people in those roles.

Actions to take:

- Use stakeholder and executive support to win over skeptics.
- Bring the Vision to life with specific examples of desired behaviors and actions tailored to each group of employees.
- Use language that is relevant and culturally aligned to your organization.

Step 5: Activate Your Vision, and Bring It to Life



Introduction

No matter how well articulated and validated your Vision is, if you're unable to appropriately activate it in ways that measurably and demonstrably improve the end-to-end customer experience then—to put it brutally—you will have failed.

Activation is about bringing the vision to life and focuses on how your business (your people, processes, tools, rewards, etc.) needs to change to close any competency gaps which exist.

This change means building the ability to design and deliver against the vision into the ongoing 'rhythm of the business.'

Accomplishing this may also result in changes to your operating model, identified by assessing the experiences you deliver today against the experiences described in your CX vision.

A gap analysis will identify areas for improvement, with action planning prioritizing those opportunities that lie at the intersection of customer needs, ease of implementation, and impact on desired business results.

Regardless of the size of that delta and what needs to occur to close it, it's critical to start by socializing your vision. Training needs to inspire, educate, and empower your people, giving them the knowledge and tools to bring the vision to life.

This means enabling everyone—leaders and employees across the organization—to understand what the company is trying to achieve, how the Vision relates to them, and what they can specifically do to deliver on it.

“Training helps bring your Vision to life by inspiring, educating, and empowering your people, giving them the knowledge and tools they need to succeed.”

Questions to ask:

- Are we capable of truly enabling our organization—our people, processes, tools, rewards, etc.—to deliver on and bring our CX vision to life?
- How do we identify and close any gaps between customer expectations and internal capabilities?
- What can key leaders and employee influencers do to socialize the Vision in ways that inspire and empower our people?

Socialization and Education: Activating Your CX Vision

How you activate your vision is unique to your culture and the Vision you wish to enable. That said, these are a few examples of initiatives we've seen be very successful.

- Create “CX Champions Groups” who demonstrate how to bring the Vision to life in different parts of the company.
- Show how the Vision comes to life by using specific, relevant stories and examples of the Vision in action.
- Coach frontline managers to continuously reinforce the Vision, helping their employees feel ownership of it.
- Help employees understand how what they specifically do contributes to the all-up customer experience.
- Embed guiding principles into existing training programs and create new modules to train the Vision.

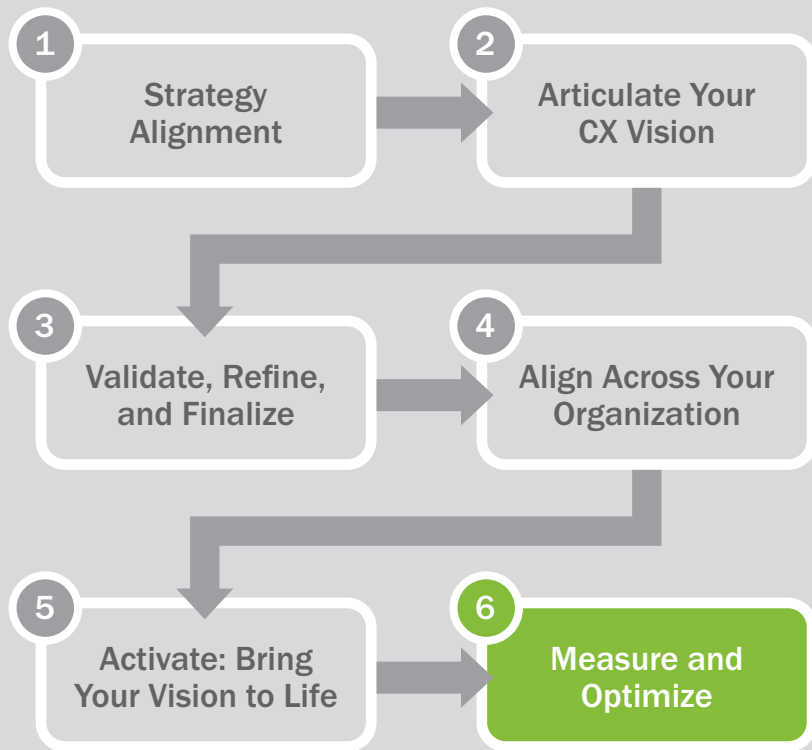
Pitfalls to avoid:

- Not translating good intentions into specific, prioritized actions.
- Failing to give people the authority, incentives, and tools they need to deliver on their parts of the vision.
- Underestimating the importance of change management.
- Not recognizing the importance of the employee experience.
- Not enabling company-wide adoption of CX ‘guiding principles’.

Actions to take:

- Take an ‘end-to-end’ approach to delivering the vision across customer journeys.
- Assign responsibility for delivering on the vision to individuals and groups across the organization.
- Train employees on how to deliver specific types of experiences aligned with their roles and your CX vision.
- Reinforce training through ongoing communication, including examples of relevant behaviors and customers’ stories.

Step 6: Measure Progress at Delivering on Your Vision, and Optimize It



Introduction

We've all heard "you can't improve what you don't measure." And yes, it applies here as well.

Knowing where you stand today is a key first step; your validation research establishes a benchmark of current performance.

This will help you measure and identify things like gaps in employee understanding and customer beliefs and feelings that will inform the actions you need to take to improve.

But for the organization to maintain focus, it's critical that business success is linked to relevant vision-related KPIs.

By linking these together, you'll see where you stand today and the impact of that on your business; you'll be able to chart a path for improvement that drives experience optimization over time.

Measurement Concepts: While by no means exhaustive, these are some concepts your program should address:

- Employee Resonance with Vision Concepts
- Employee Understanding of Employee Actions
- Customers' Resonance with Vision Concepts
- Customers' Feelings about Vision-Driven Experiences
- How Employee Actions Drive Customer Feelings
- How Customer Feelings Drive Business Results

“Delivering on your brand promise by bringing the CX Vision to life is a continuous process, requiring ongoing assessment, reflection, and improvement.”

Questions to ask:

- What metrics are we gathering today, and how? Can these metrics align with our tracking of the Vision?
- What drives customer perceptions? What are the operational drivers of positive or negative customer belief?
- How will we act on what we learn? Without defined accountabilities for analysis and a system for responding to insights, it will be harder to succeed.

Pitfalls to avoid:

- Lacking the discipline to measure progress on an ongoing basis; success requires continuous refinement and action.
- Starting from scratch: leverage existing employee and customer listening posts to gather the insights you need.
- Not developing a plan to act on what you learn and knowing who you will turn to in order to ensure action is taken.

Actions to take:

- Define your communication plan: know how you will keep key stakeholders aware of progress, success, and opportunities for improvement.
- Analyze and visualize data in ways that can inform potential actions for employees and leaders—and know which underpin or drive desired business results.
- Consider strategic outsourcing to maximize efficiency and employee time.

A 6-Step guide for designing your CX Vision Metrics and measurement program

- 1. Deconstruct Your Vision:** Break your Vision into component parts that you can measure.
- 2. Map Current CX Vision-Related Metrics:** Identify existing brand and CX Vision-related Metrics and how they're gathered and measured. Include Voice-of-the-Customer as well as Operational and Employee Behavior Metrics.
- 3. Leverage Existing Listening Posts:** Instead of starting from scratch, find ways to pull existing measures and add new metrics to measure where relevant, viewing all through a CX Vision-centric dashboard.
- 4. Develop a System for Distributing Insights:** Know who needs to see what information and how that information will cascade through the organization.
- 5. Develop a System for Responding to Insights:** Ensure that there is a defined cadence for identifying and prioritizing improvement opportunities and operationalizing them.
- 6. Optimize and Improve:** Delivering on your brand promise by bringing the CX Vision to life is a continuous process, requiring ongoing assessment, reflection, and improvement.

Now? Now it's time to start...

Where to Go from Here...

A Vision-Led, Customer-Centric Organization

Customer obsessed. Customer-centric. Customer first, customer led. No matter how your organization talks about your customer strategy, it's important to remember that considering your business from the customer's perspective is an active choice (easy to overlook, too).

It's also a competitive requirement, as smart, digitally-enabled customers increasingly control their relationships with the companies that serve them.

Also know that this strategic choice doesn't mean you forgo the "ROI lens" on customer-related investments—which aren't (and shouldn't) be made just to drive customer centricity.

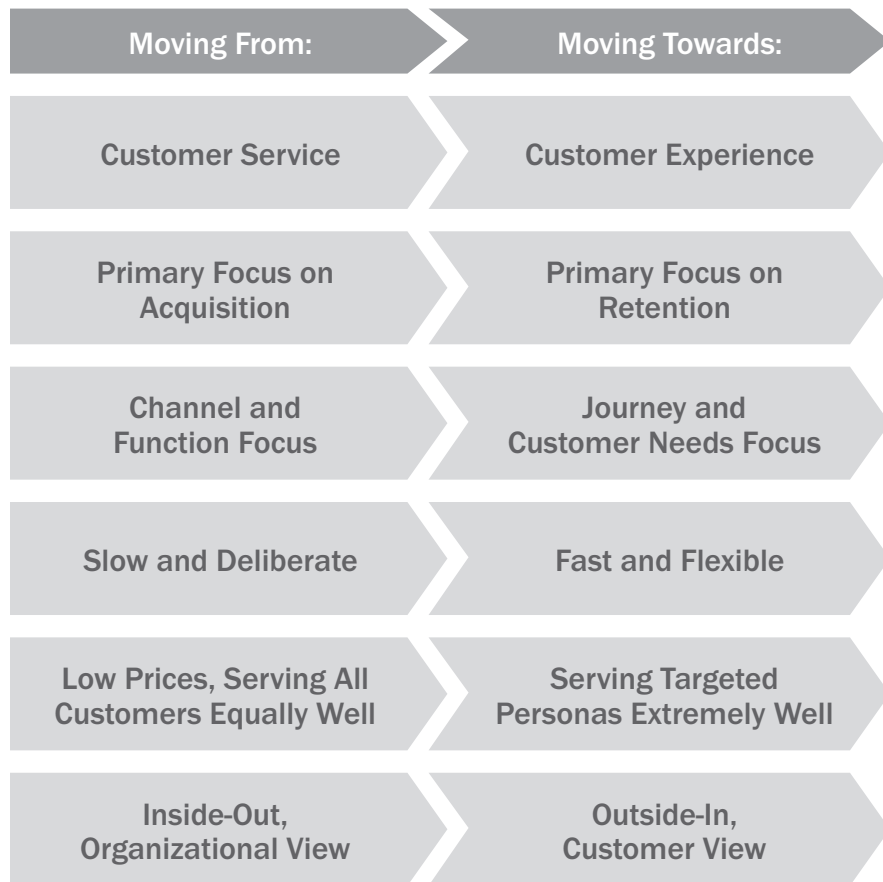
In leading companies, customer centricity joins traditional investment rationale such as revenue enhancement, process and experience improvement, and cost reductions as an important decision-making filter—and as one of many.

Being a vision-led, customer-centric organization means many different things.

But know that no matter you define it, success means that you will have the organizational ability to understand and meet your customers' key goals better than your competition.

It also means you'll do so in ways that consistently meet and exceed customer expectations of your brand, driving growth and profit along the way.

What a Vision-Led, Customer-Centric Organization Looks Like: It doesn't mean walking away from what's made your organization successful in the past. It does mean that you build on what works while moving towards the kinds of customer-centric behaviors which provably drive business success.



Proven Vision Pillars to Consider

Your CX vision has to be many things to be useful. At a minimum, it should be aspirational, accessible, inspirational, and actionable.

Short, crisp and to-the-point, it can be broken down into concepts, behaviors, and actions that your people can understand and act on.

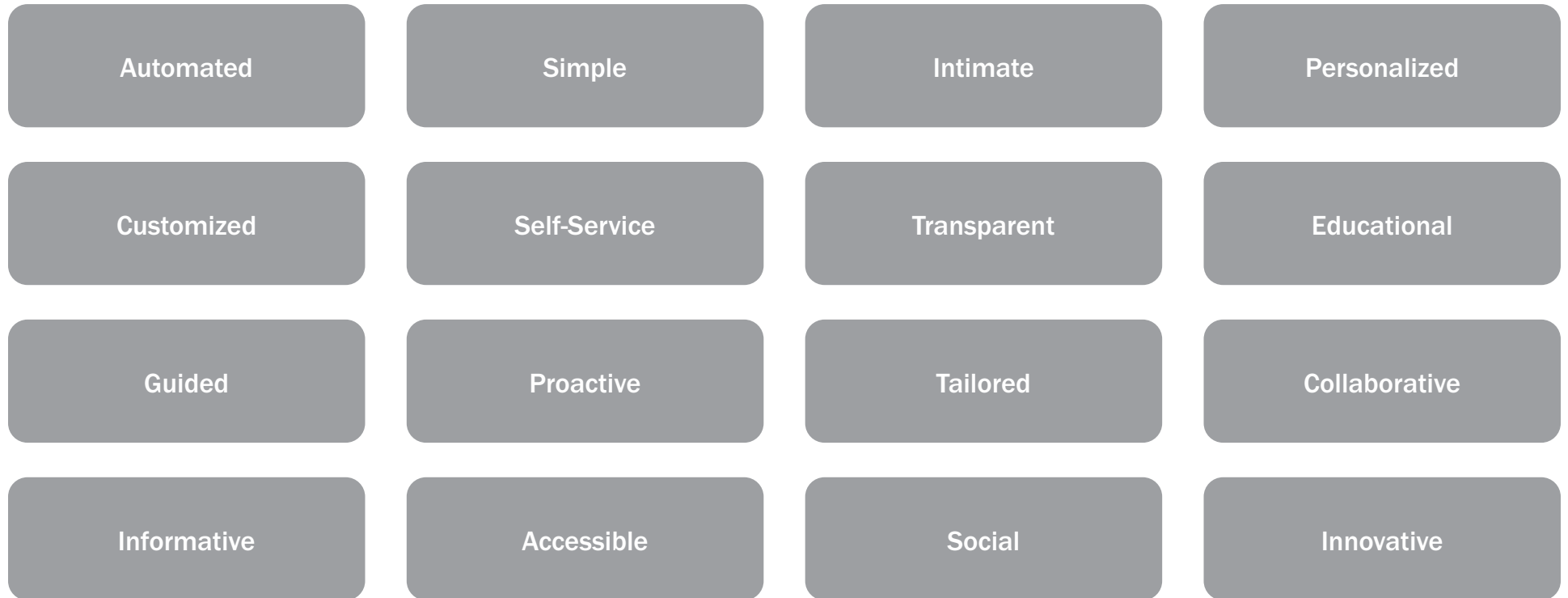
Plus, your customers will need to “see” the impact of these behaviors and actions in the interactions they have with your organization across channels, devices, and journeys.

Over the years, we’ve seen some CX Vision themes (what we call “CX Vision Pillars”) repeat themselves over time.

While we’ve cataloged 58 so far, the 16 on the following page tend to repeat more than others. Appearing on the following page in summary, five examples include:

- **Simple:** Easy, intuitive, and uncomplicated interactions
- **Automated:** Self-service tools reduce human touch while delivering high value
- **Innovative:** Adding value with new, leading-edge solutions
- **Proactive:** Anticipate and act on customer needs, in many cases before the customer is aware of those needs
- **Personalized:** Customers feel experiences are uniquely tailored for or personalized to their needs

CX Vision Pillars



These aren't meant to make sense for all organizations or industries, but they can (and should) be used as inspiration.

Considered individually or in combination, do they support the experiences your customers expect? (Opportunity). Are or could they be used by competitors in your industry? (Threat).

Consider how one or more of these pillars may align with your competitive strategy, uniquely support your brand, and help you deliver against customer expectations.

If you'd like the full catalog of our CX Vision Pillars, visit us online at www.mcorp.cx or send a note to hi@mc Corp.cx.

“For some companies, the change is modest. For some, transformational. For others, it’s just hard. The good news is that there’s a proven approach to get there.”

Six Common Pitfalls to Avoid

Even if an organization has built a robust strategy designed to accomplish everything it needs to, it still has several challenges to overcome. This isn’t surprising, given that any shift toward greater customer-centricity requires some degree of organizational change. For some, the change is modest. For some, transformational. For others, it’s just hard.

In our work with organizations of all sizes (from midmarket leaders to the Fortune 100 companies) and across industries (from insurance and technology to retail and banking), we’ve seen a number of common challenges that these companies have had in operationalizing their customer experience strategies.

The biggest “success blockers” occur when companies don’t:

- **Socialize the CX strategy broadly, across the organization:** Customer experience is a team sport. This means it isn’t managed or controlled “just” by marketing. Or operations. Or IT. It means that every part of the organization needs to understand the strategy, their role, and the dependencies across the organization to enable it.
- **Define implications at the role and employee level:** Beyond departmental or functional understanding, employees need to know their role, what their responsibilities are, and how they are empowered to deliver on the strategy. After all, if your people don’t know what they need to do, they simply can’t do it.

- **Assign a CX leader to ensure socialization and adoption:** One of our clients at a Fortune 100 retailer put this best: “If everyone’s in charge of CX, no one’s in charge of CX.” Though everyone in your company has a role, the ability to orchestrate and influence CX across an organization requires executive-level CX leadership to drive it.
- **Make CX strategy a cross-organizational lens for planning and decision making:** From supporting the delivery of the multichannel experiences your customers demand to deciding where to focus resources, your CX strategy needs to be well understood across the enterprise and consistently used as a lens for planning and decision making.
- **Filter product, service, and CX design through the lens of CX vision and strategy:** Customer experience design and innovation are core disciplines of CX leaders. But without the north star of customer experience vision to inform design frameworks and guide design efforts, it’s difficult to stay focused on building strategically relevant experiences.
- **Measure how well the organization is delivering against the CX strategy:** Have you noticed that CX leaders are also voice-of-the-customer leaders? This isn’t a coincidence. (Think QVC, Apple, or Zappos). That’s because understanding from your customers’ perspective how well you’re delivering on your strategies is the only way to truly ensure you are.

Getting Started: Outside Help

We've led this kind of work for nearly 20 years with some of America's (and the world's) largest and most successful organizations, as well as myriad mid-market leaders across North America.

As a result, we know what works, what doesn't, and why—and have developed a proven, replicable, and teachable approach to becoming a more customer-centric organization.

Because as important as strategy and vision are, without the ability to translate them into an operating plan and actionable roadmap, they're just words.

This experience is why organizations turn to us—for the outside and unique perspective as well as the methodologies, tools, and frameworks that can help bring your CX Vision to life.

Interested in an outside perspective on your CX Vision?

We'd be delighted to help. When it comes to leveraging customer experience as a competitive advantage and a financial driver, we've counseled fast-growth market leaders and Fortune 500 executives. We'd love to help you, too.

Call 1-866-526-2655 or visit us at www.mcorp.cx to learn how we can help you create, validate and activate a CX vision and strategy for your organization.

4 Things You Can Do Now to Take Action

Enabling a CX Vision-led organization is a multi-step journey. And as with all journeys, getting started can often be one of the greatest challenges.

With this in mind, we wanted to close this guide with some specific and relatively quick things you can do today to help you take those first steps...

- 1. Great CX Workshop:** What can great CX look like in your organization? In this fast-paced work session, you'll develop a draft ('straw model') CX Vision, a high-level view of what it will take to enable it, and a roadmap to get there.
- 2. Executive Briefing:** An executive briefing session that covers the impacts of CX, how vision-led organizations compete and drive value and examples of them, plus what it takes to become one.
- 3. Executive Coaching:** Help executives roll up their sleeves to understand and internalize CX, including plans to enable the business, organize the work, begin execution, and measure the results in concrete, meaningful ways.
- 4. Vision Design Workshop:** Working with key stakeholders, we model a comprehensive CX Vision framework that delivers on the promises of your brand, and we define and prioritize the actions and behaviors required to bring it to life.

Glossary of Terms (Abridged)

- **Activation:** Bringing the vision to life in your organization and building the ability to design and deliver against it into the ongoing ‘rhythm of the business.’
- **Brand Strategy:** A formal plan used to create a specific image of the organization in the minds of its customers and employees.
- **Brand Promise:** A statement made by an organization to its customers that states what customers and employees can expect from their products, services, and experiences.
- **Customer-Centric:** Considering your business from the perspective of your customers, often putting ‘the customer view’ at the center of your decision-making process. (Also customer obsessed, customer first, customer led).
- **Customer Experience (CX):** How customers perceive their interactions with your company
- **Customer Experience Management (CXM):** The collection of best-practice capabilities and processes used to systematically design, deliver, and react to customer interactions.
- **CXM Capabilities:** The eight best-practice based organizational capabilities for scaling and systematizing customer experience management expertise. (*Definitions on [page 4](#)*)
- **CX Metrics System:** An end-to-end action system used to gather, analyze, and act on CX metrics
- **CX Metrics:** The business results, customer behaviors, customer perceptions, and operational metrics that result from (and can indicate) the experiences your customers have.
- **CX Vision Pillars:** The concepts, behaviors, and actions that make up your vision and that guide organizational behaviors in ways your people can understand and act on.
- **(Employee Type) Direct:** Those whose actions directly impact the customer. (e.g. front-line staff, call center, sales, service, etc.)
- **(Employee Type) Indirect:** Those who plan for, design, and/or build strategies to create customer experiences. (e.g. marketing, digital, retail operations, etc.)
- **(Employee Type) Support:** Those who support the employees who deliver and plan the customer experience. (e.g. IT, Legal, HR, etc.)
- **Experience Strategy:** Your plan for bringing the vision to life by guiding your people, activities, and systems and informing the prioritization and use of resources with your customer in mind.
- **Experience Vision:** Part of Experience Strategy, it articulates who you’ll serve and how you want them to feel—aligned to your brand in ways that meet the expectations of your customers, employees, and other key audiences.
- **North Star:** Using the CX Vision as a point of orientation and shared set of goals that are understood and embraced by the entire organization.