



Research by the Customer Experience
Professionals Association (CXPA) and McorpCX

The Pivotal Role of CX Education and Upskilling in Accelerating Customer Centricity Leadership

~500 global CX leaders and practitioners
reveal the connections between customer
experience (CX) education and greater
customer experience maturity.



“I don’t think you’d have organizational movement toward customer centricity without having learning and education in place. It’s a prerequisite.” Research Participant

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Executive Summary

New research released by the Customer Experience Professionals Association (CXPA) and McorpCX shows investment in organizational-wide Customer Experience (CX) education and upskilling plays a crucial role in enabling customer-centric business performance.

This co-sponsored research conducted with ~500 global CX leaders and practitioners explored the role CX education and upskilling plays in accelerating customer-centric leadership and business performance, leadership's priorities relative to CX education, the employee groups who most need CX education and upskilling, priority educational topics, common barriers to doing more, and a roadmap for how to build CX education and upskilling into the CX strategy.

This study reveals:

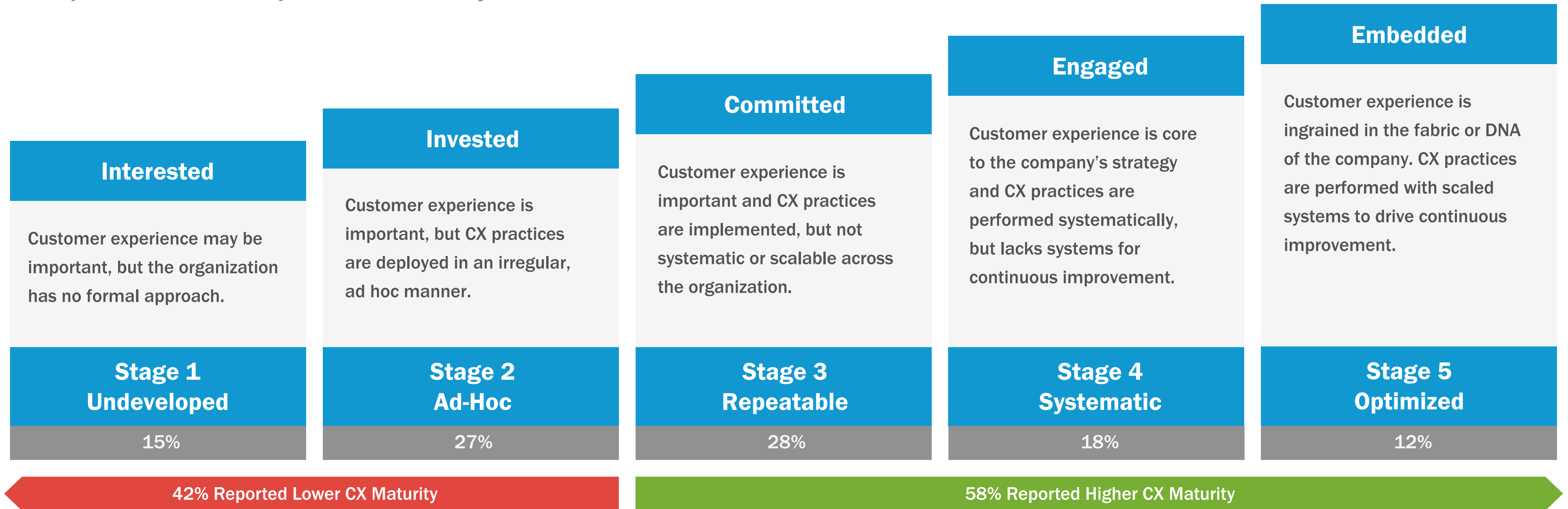
- **Organization-wide CX education is tied to higher CX maturity:** Companies that invest in CX education and upskilling, CX maturity is higher, making customer-centric business performance possible.
- **Many employees don't get the CX link to business success:** While CX is a strategic priority for most companies, few in the organization—only 51% of leaders, 33% of managers and 24% of staff—understand the connection between CX and customer centricity as a driver of business success.
- **Leaders value CX in word, but don't prioritize educating and upskilling for their people:** Less than 10% of leaders are actively sponsoring CX education and skills building, but as CX maturity rises in an organization, the importance of CX educational activities rises.
- **Effective CX education and upskilling should be based on organizational CX maturity:** One size doesn't fit all when it comes to educating the organization. This report includes six design principles and a high-level roadmap by CX maturity level for integrating CX educational activities into your CX strategy.



The CX Maturity Model

All participants rated their organization's CX maturity using the McorpCX Customer Experience Management (CXM) Maturity Model. High and low levels of maturity were reported, offering rich insights into perceptions and attitudes about CX education and upskilling and the linkage to experience management maturity.

McorpCX Customer Experience Maturity Model Definition



“CX Training can’t just be theoretical. Of course we want to understand what our customers think. But how are we going to translate that voice of the customer into making improvements that add value to the organization?” Research Participant

Research Findings



Higher CX Maturity is linked to organization-wide CX education

Companies that invest in CX education and upskilling, CX maturity is higher, making customer-centric business performance possible.

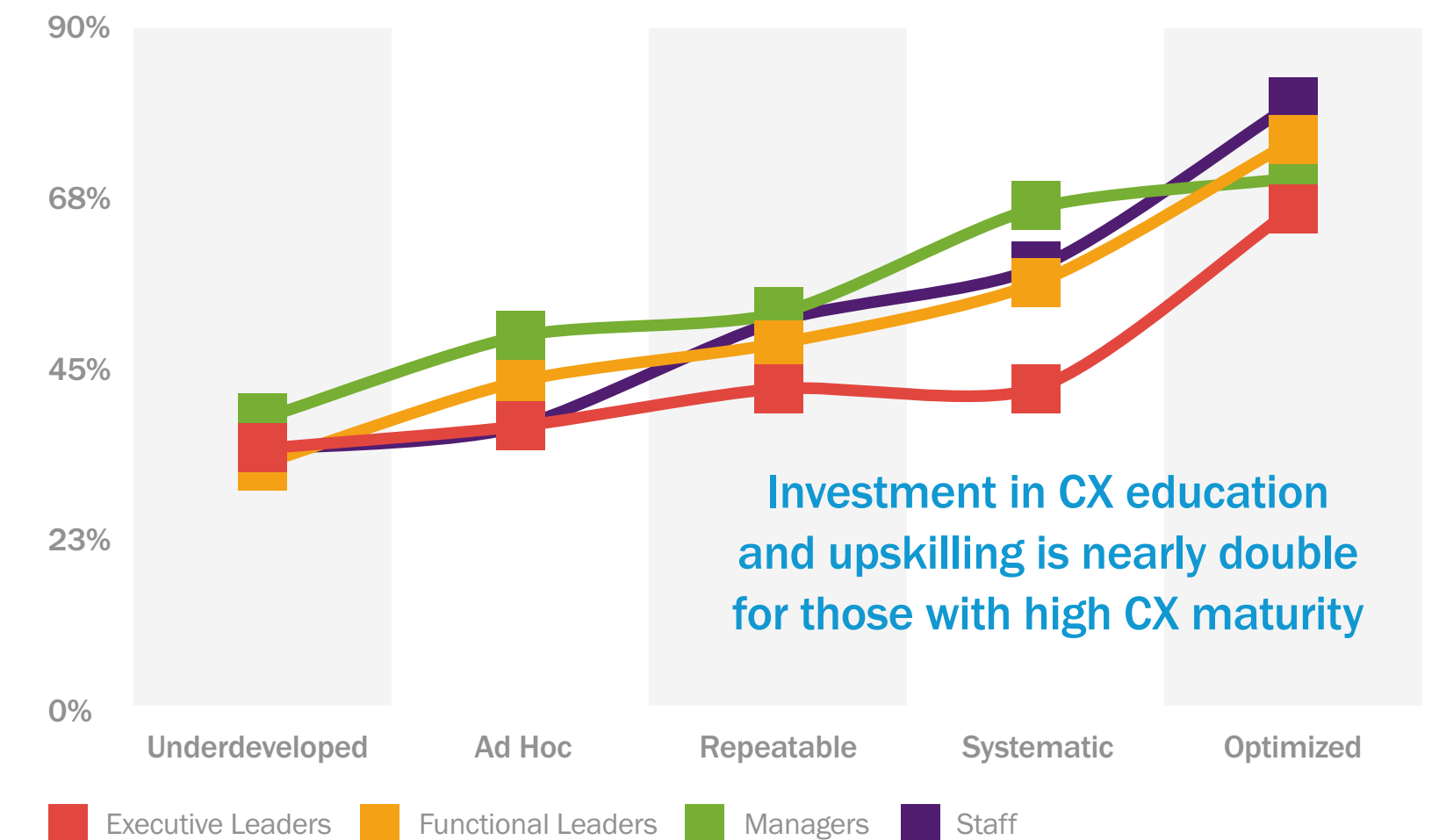
Investment in organizational-wide CX education and upskilling almost doubled for firms with high CX maturity, and staff roles as the top-cited group.

Training was characterized as:

- **Self-directed:** Driven by the intrinsic motivation of the employees
- **Ad hoc:** Informal “lunch and learns” and departmental check-ins
- **Foundational:** Focused on CX 101, often included in new hire orientation
- **Targeted:** Conducted with targeted project teams or customer-facing teams

“The differential is that customer centricity is a mindset, standard and process. Training fits in at every stage as a way of reinforcing the standards and the why. So defining what CX means in order to get to the next maturity level, and designing training that supports those strategies, brings an organization along the way in a nice cadence. It would also help CX practitioners because resources would be allocated within training to support that journey.” Research Participant

Top Employee Groups Offered CX Education/ Upskilling in the Past Year by CX Maturity Level



Employees need to better understand the link between CX and business success

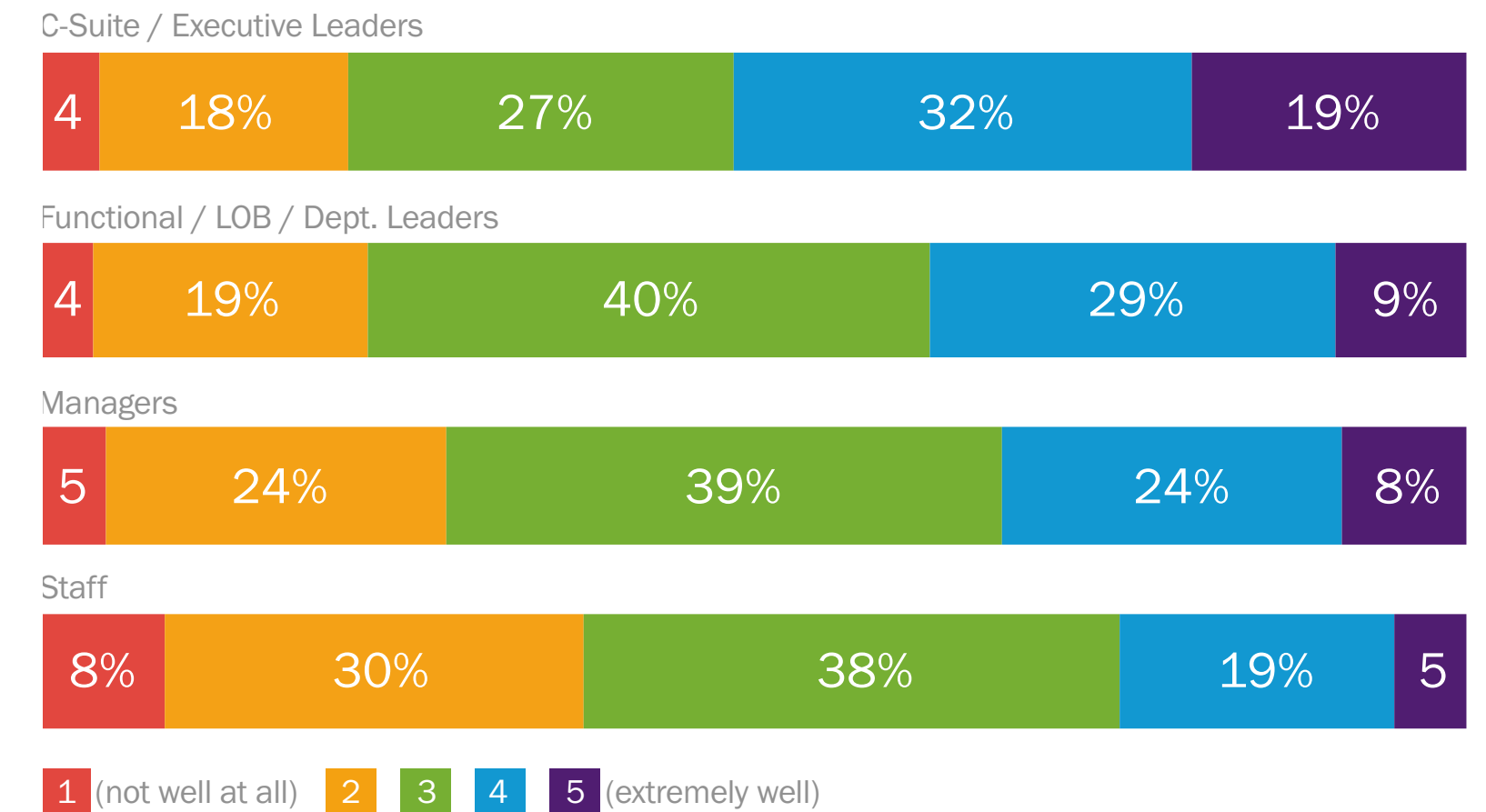
While CX is a strategic priority for most companies, few in the organization—only 51% of leaders, 33% of managers and 24% of staff—understand the connection between CX and customer centricity as a driver of business success.

Providing the organization knowledge about CX and its effect is the first step to shifting the mindset. The understanding of this connection increases for all employee groups as the CX maturity level rises. The manager and staff groups rise slower than the leadership groups.

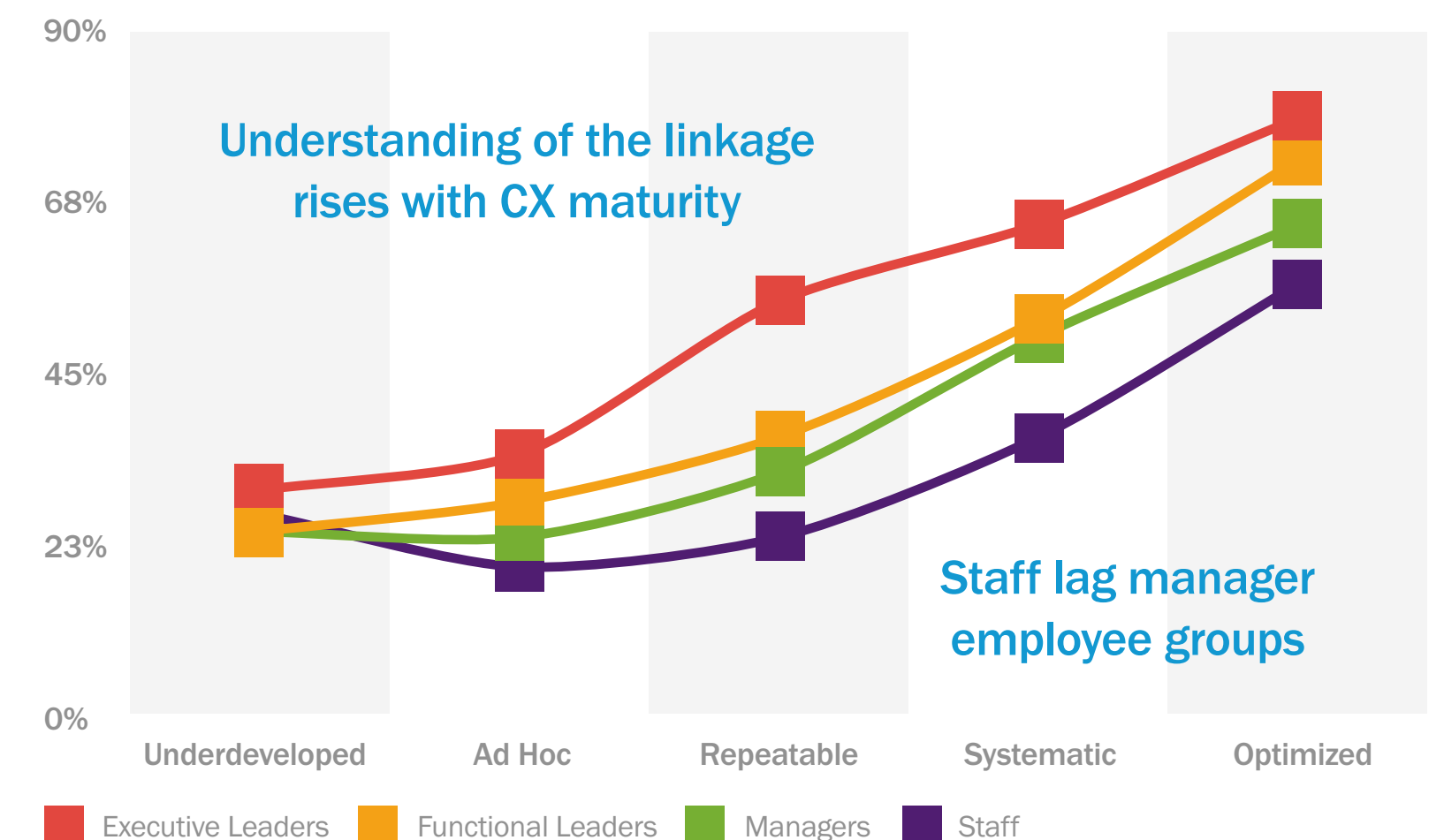
“From field reps, to contact centers, to the marketers, and on brand teams, they are too busy executing to really appreciate the power of being customer-centric.”

Research Participant

Rating of how well each role understands the connection between CX and achieving the company’s strategic outcomes.



Employee groups who understand the connection by CX maturity and role



The more mature the organization, the greater priority leaders put on educating and upskilling their people

While most executives cite the importance of a customer-centric mindset, few invest in enterprise CX upskilling. Less than 10% of leadership are actively sponsoring CX knowledge and skills building with almost one-third reporting not a priority.

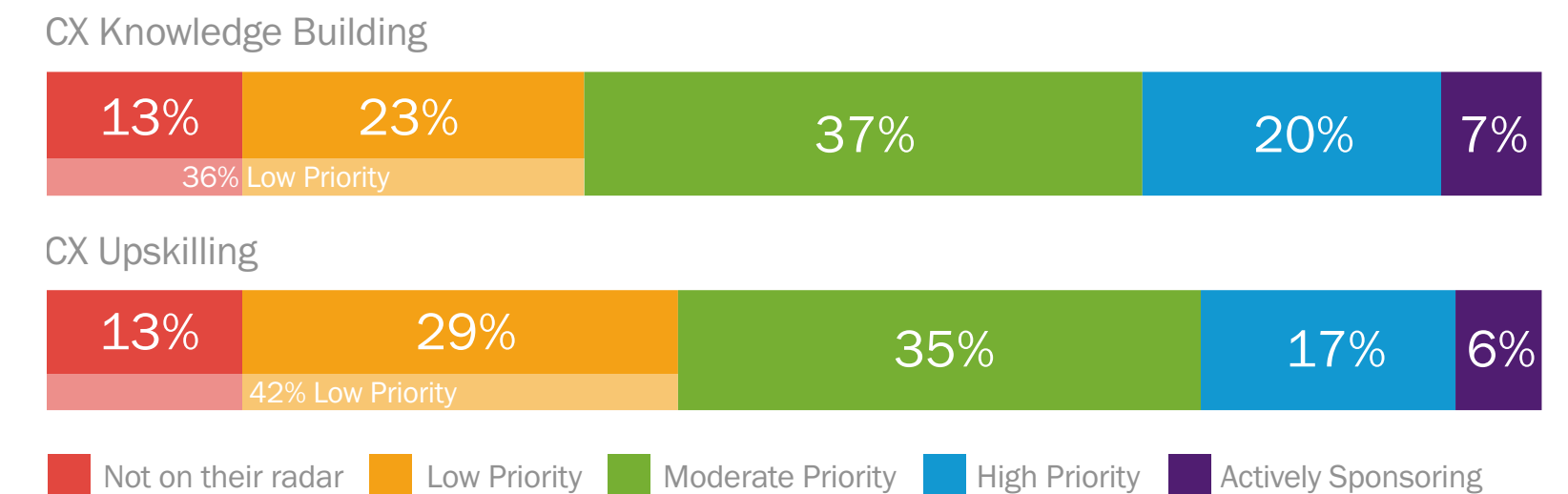
“It hasn’t been a priority for senior leadership, and business lines are quite siloed within the organization that a lot of things get lost within the management ranks.” Research Participant

“We’re always dealing with competing priorities. And I think while they feel it’s important, it may not be the most important.” Research Participant

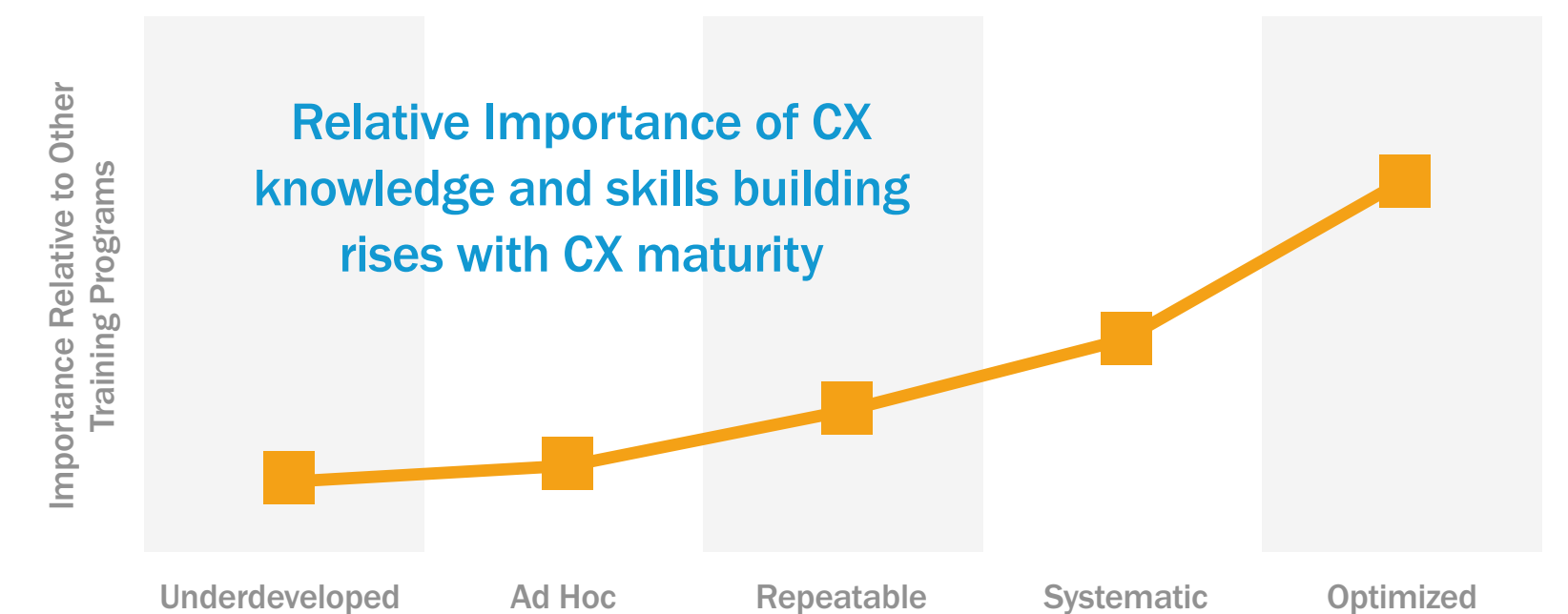
What’s interesting is as CX maturity rises in an organization, i.e., CX practices become more repeatable, systematic and embraced more widely by employees, the relative importance of organization-wide CX Education rises. Implying there is a tipping point in the CX maturity curve where enough employees understand the value of CX and have the acquired the skills to apply it, things begin to snowball.

“It did start to snowball. Once one team starts to understand the value of [CX], others start asking for customer data. And before you know it, everyone starts asking.” Research Participant

Senior leadership’s priorities related to employee CX knowledge and skills building



The importance of CX knowledge and skills building relative to all other training programs by CX maturity



Education has its greatest impact in organizations that embed CX as a part of everyone's job

Among the participants who offered some type of CX education and training, only 40% reported their efforts drove measurable business value from the CX knowledge and skills building offered in the past year.

Eleven percent of organizations indicated the impact of education is difficult to quantify. Ones with higher impact, indicated it was because they made it a priority, training managers who are key to reinforcement and embedding CX as part of everyone's everyday job.

“We’re trying to tack on training of CX as a separate thing, when really it should be integrated with the training that’s already being brought to people in their day-to-day jobs, not looking for those extra budgets.” Research Participant

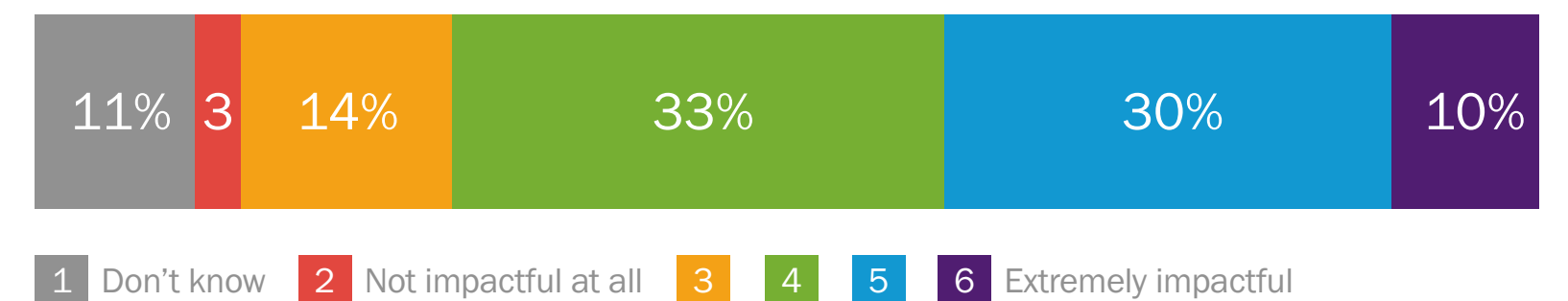
The impact of CX Education in organizations is correlated to their CX Maturity.

More mature organizations were twice as likely to indicate that CX education was impactful. Less than half of the organizations with lower maturity said that CX education was impactful.

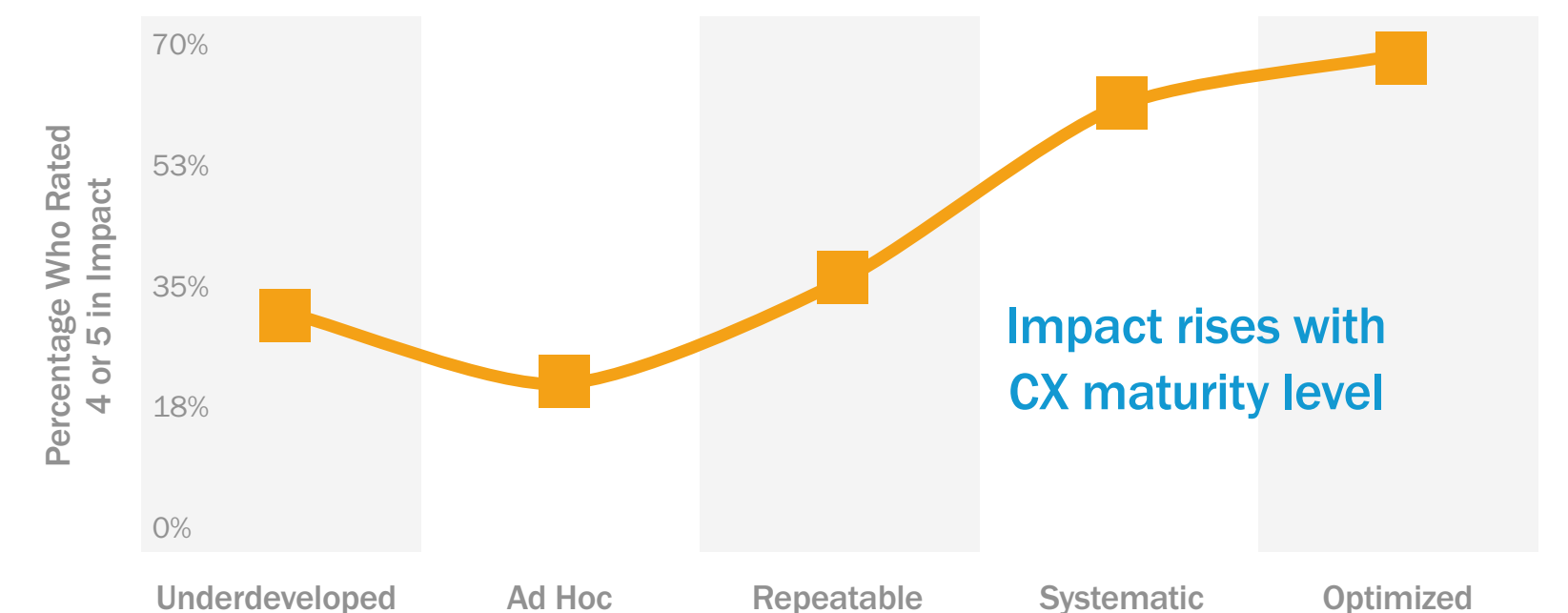
“The leverage was when we built it in (to the onboarding unit) where we talk about all the vision and values. Whether or not it’s a UX project, or a whether it’s a sales project or support project, we had to budget [CX] in there to kind of build in the fundamentals.”

Research Participant

The impact of CX knowledge and skills building offered to employees this past year in furthering the CX strategy and driving business value



Those who rated highly impactful CX Education and Upskilling by CX Maturity level



Leadership education is the highest priority.

Organizational leaders most need CX knowledge and/or skills

Participants ranked executive and functional leaders as the highest priority employee groups who need CX education and training – this is particularly and predictably so in organizations with ad hoc or underdeveloped organizational maturity in CX.

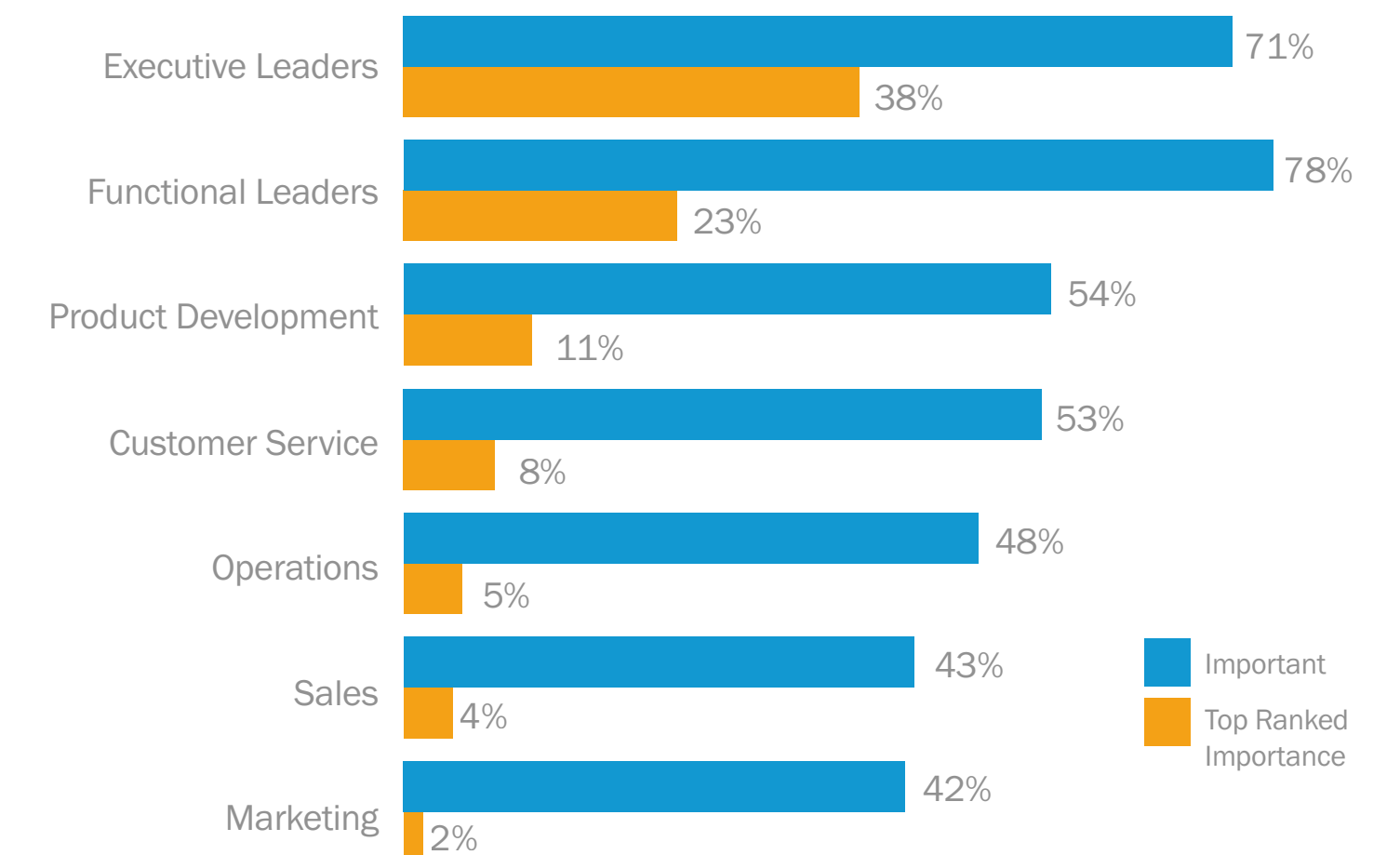
Customer Insight and Understanding is considered to build greatest value

Customer Insight and Understanding was top topic respondents agreed their organizations needed to build knowledge. Other training needs included Customer Centricity (what it means with general foundational CX principles and concepts), and the business impact of CX through CX metrics and measurement and ROI.

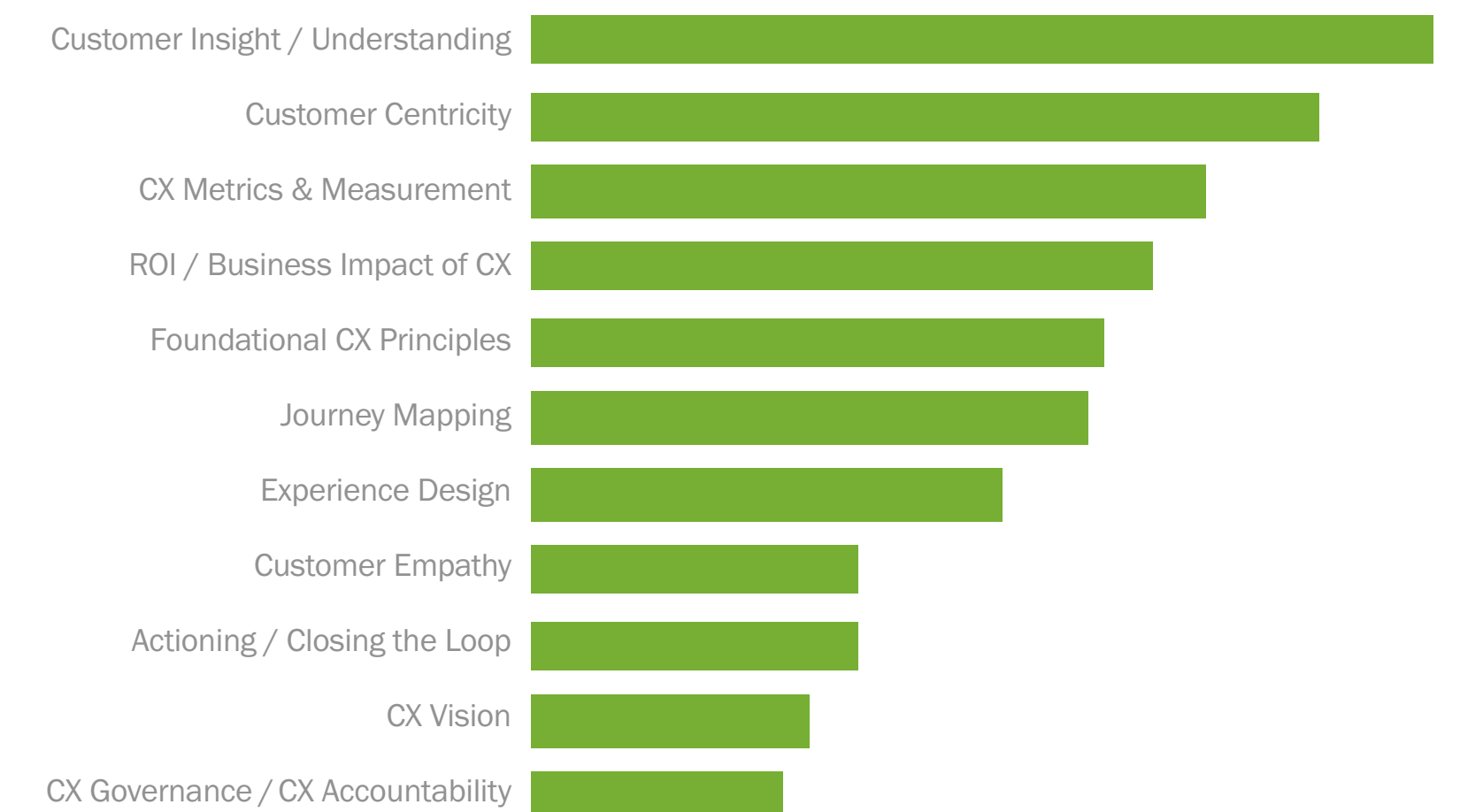
“When you work with headstrong product managers, sometimes they think that they know best and have decided what to what problems to solve without really running it by customers. And that can sometimes create friction. So sometimes we do forget the customer centricity in the things that we’re building. And that can be a struggle.”

Research Participant

The rank order of the employee groups who need CX education and training



The top ranked educational topics or subject areas to drive the greatest business value



“It’s comforting that my observations are borne elsewhere. These findings give me more ammo to do the things we ought to be doing. It gives me more reinforcement and makes me very confident in taking a direction that has not been rigorously codified.” Research Participant

Key Recommendations



How to build CX education & upskilling into your CX strategy

Design principles that apply to every organization. Start small, in strategic parts of the business, creating small wins that help you make big progress.

Below are six guidelines to keep in mind when building organization-wide CX education and upskilling into your CX strategy. These guidelines apply to any organization, no matter the level of CX maturity. Design the CX education and upskilling in ways that embed the context to make it relatable and applicable. Start with the foundational aspects of CX that creates a common understanding for all, then customize by learning role. Help each role make the CX to business value connection. Then scale the effort leveraging the training ecosystem, enabling and reinforcing customer-centric ways of working

“It cannot be a one-time thing during CX week, it needs to start at onboarding and be a consistent thing that is taught.” Research Respondent

Embed Context

Off the Shelf Training isn't enough! CX training should have examples from your industry, your company, and your idols to make it relatable and actionable.

Build a Strong Training Ecosystem

Collaborate with HR/L&D and leverage change champions and managers to foster a culture of customer-centricity and shared knowledge linked to existing company values and culture.

Create Foundation, then Customization

Develop a core curriculum to ensure every employee is operating from the same core set of knowledge, then offer customization aligned to roles and skills.

Enable the Change

Embedding CX requires changing culture, which takes time. Infuse change techniques and amp up communication while conducting education.

Elevate CX Value to Enterprise

Make the connection that better business performance results from increased application of CX and education is the driver for an upskilled workforce and CX maturity.

Reinforce the Value

CX is not just about the company's success. Education should highlight how both customers and employees benefit from CX-centric ways of working.

Consider your current maturity before choosing a path forward

Less mature organizations

succeed when focusing on launching education in pilots, supported by sponsors, generating success stories with some qualitative and quantitative impact.

More mature organizations

found greater success in educating deeper and wider into the organization and engraining CX as a standard way of working supported by a ROI model to report results.

There's an education roadmap you can follow to improve customer centricity, no matter your stage of CX maturity.

Determine the best CX education and upskilling path for you, based on your organization's current level of CX maturity.

Educational programs tailored to the CX maturity stage are crucial for driving experience improvement.

By structuring education around the CX maturity model, companies can create a more effective and adaptive workforce capable of meeting evolving customer expectations. The model on page 4 provides an estimate of where you are, and the most relevant education programs for your people.

It's critical to equip employees with the appropriate skills and knowledge to help advance customer centricity based on where the organization is today. This will prepare them to accelerate their understanding and capabilities, as maturity grows.

Stage 1 Underdeveloped	Stage 2 Ad Hoc	Stage 3 Repeatable	Stage 4 Systematic	Stage 5 Optimized
In this stage, educate at least one stakeholder with a basic understanding of CX and educate their team on CX and application of CX tools in an important project.	Expand to include key stakeholders as well as business line and functional leaders with a focus on value, a common language, and ways of thinking.	Ensure executives understand the opportunity and value of CX, embed in employee onboarding, and train customer-facing employees in areas such as insights-to-action and empathy.	Expand to groups that don't interact with the customer as well as with partners and providers, and add closed-loop actioning and key frameworks and tools.	In this stage, advance understanding to more complex skills and applications closing knowledge gaps and leveraging reinforcement tools. Personalize learning to roles.

The ability of an enterprise to enhance boost customer-centricity through CX education is vital, though many businesses struggle to see the impact, often due to a lack of understanding about the stages of CX maturity within their organization, and the effective learning programs at driving knowledge and behavior change at each stage.

Customer experience, Learning and Development and HR professionals can follow the roadmap below to build awareness of and upskill the enterprise on CX mindset, knowledge and practices.

	Underdeveloped	Ad Hoc	Repeatable	Systematic	Optimized
Primary Audiences	<ul style="list-style-type: none"> Executive Sponsor Pilot Team Pilot Business Owner(s) Reporting Team 	<ul style="list-style-type: none"> Advisory / Governance Roles Digital / Marketing, Product, HR, L&D People Leaders 	<ul style="list-style-type: none"> Executives New Hires Customer Facing Employees 	<ul style="list-style-type: none"> Indirect (non-customer facing) Employees Service Providers, Partners, and Outsourcers 	<ul style="list-style-type: none"> All roles
Critical Content	<ul style="list-style-type: none"> CX Foundations Inside-Out Thinking Company's Commitment to Customers ('CX North Star') Pilot-Specific Tools 	<ul style="list-style-type: none"> CX Governance Tools ROI and/or Business Case for CX Common CX Language Design Thinking Personal WIIFM ('what's in it for me') 	<ul style="list-style-type: none"> Customer Insights CX Metrics / Measures Data Driven Decision Making Empathy 	<ul style="list-style-type: none"> Closed Loop Systems CX Center of Excellence Tools Standard CX Frameworks 	<ul style="list-style-type: none"> Refresher Tools New Applications and Success Stories Skills to Address CX Performance Gaps Advanced Service Skills
Type of Education	<ul style="list-style-type: none"> Learn, try, apply (Pilot CX training with small group applying CX to improve outcomes) Continue approach throughout maturity lifecycle 	<ul style="list-style-type: none"> Learn, try, apply Embed CX concepts into corporate training with support from L&D / HR Facilitation skills and reinforcement tools for decision makers and leaders 	<ul style="list-style-type: none"> Learn, try, apply Microlearning for knowledge Experiential learning for skills Storytelling 	<ul style="list-style-type: none"> Microlearning for knowledge Experiential learning for skills and CX tools Gamification and scenario-based learning 	<ul style="list-style-type: none"> Personalized education to close CX skill gaps contextualized for roles, functions, regions, etc. Reinforcement education and upskilling

About the research

McorpCX conducted qualitative and quantitative research with customer experience professionals to understand the role enterprise-wide CX education and upskilling factored into enabling customer-centric business performance.



Qualitative Research

11 Participants

- CX Leaders
- Working in mid- to large-sized companies
- Located in the US and Europe

Research Method

- 1:1 phone interviews
- ~45 minutes in length
- Conducted August 2023



Quantitative Research

487 Participants

- CX Leaders and practitioners
- Working in mid- to large-sized companies in the financial services, technology, healthcare, consumer goods, manufacturing, among other industries
- Located in North America, Europe, Asia and Africa

Research Method

- Online survey
- ~14 minutes in length
- Fielded October–November 2023



Expert Validation

12 CX Leaders & Practitioners

We shared a preview of the report with a small group of CX professionals to validate our findings and recommended roadmap.

Special thanks to Benjamin Easaw, Lauren Deeney, Sandra Fornasier, Lisa Hague, Bradley Kelly, Susan Mango, Mumbi Odame, Jerry Pasierb, Greg Tucker and Robyn Weil who provided insightful feedback that helped shape our final report.

About CXPA and McorpCX

CXPA

Founded in 2011, the Customer Experience Professionals Association is the independent global non-profit organization. We increase the impact and visibility of customer experience professionals, facilitate effective member-to-member sharing, and establish respected standards. We publish the CXPA CX Book of Knowledge and grant the Certified Customer Experience Professional (CCXP) certification.

McorpCX

McorpCX helps organizations drive greater value by improving stakeholder experience. Recognized by industry analysts as a customer, employee, and digital experience strategy, services and solutions leader, we unlock growth by helping organizations better serve, sell to, and engage with their audiences.

McorpCX has been a leader in Customer Experience for two decades and adapted enterprise education sessions to meet the needs of firms like Microsoft, Intel, The Hanover Insurance Company, and The Institutes, among others. We co-created materials to educate employees on foundational CX knowledge as well as more advanced skills. In 2023, McorpCX founded the Customer Experience Masters Academy (CXMA) to provide training for all enterprise employees.



Thank you

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