

Customer Experience Strategy: Establishing your “North Star” Vision

An McorpCX Best Practices Webinar:
Bringing Your Brand Experience to Life for
Your Customers, and Your People

September 24, 2020



Your Host: Michael Hinshaw, President of McorpCX



- CX industry pioneer, on multiple “Global CX Thought Leaders to Watch” lists
- Guiding executives and their companies on improving customer experience since 2002
- McorpCX Practice Lead: Experience Strategy
- 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 School of Business

For over 18 years, McorpCX has helped leading brands plan for, design, and deliver better customer experiences



McorpCX helps activate customer-centric experience transformation—and drive results—in two core areas:

Improve Targeted Experiences

Applying customer (CX), employee (WX) and experience (XM) frameworks, capabilities and staff to help deepen understanding and activate experiences.



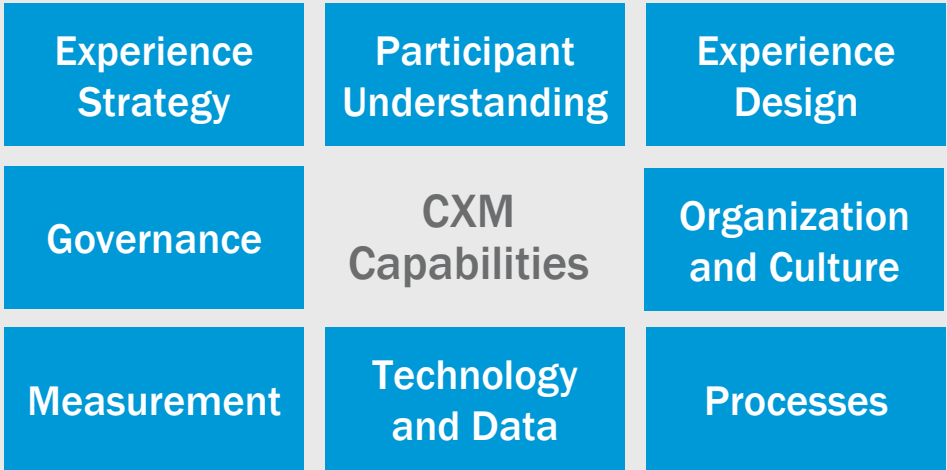
For prioritized Participant personas

Across prioritized Participant journeys

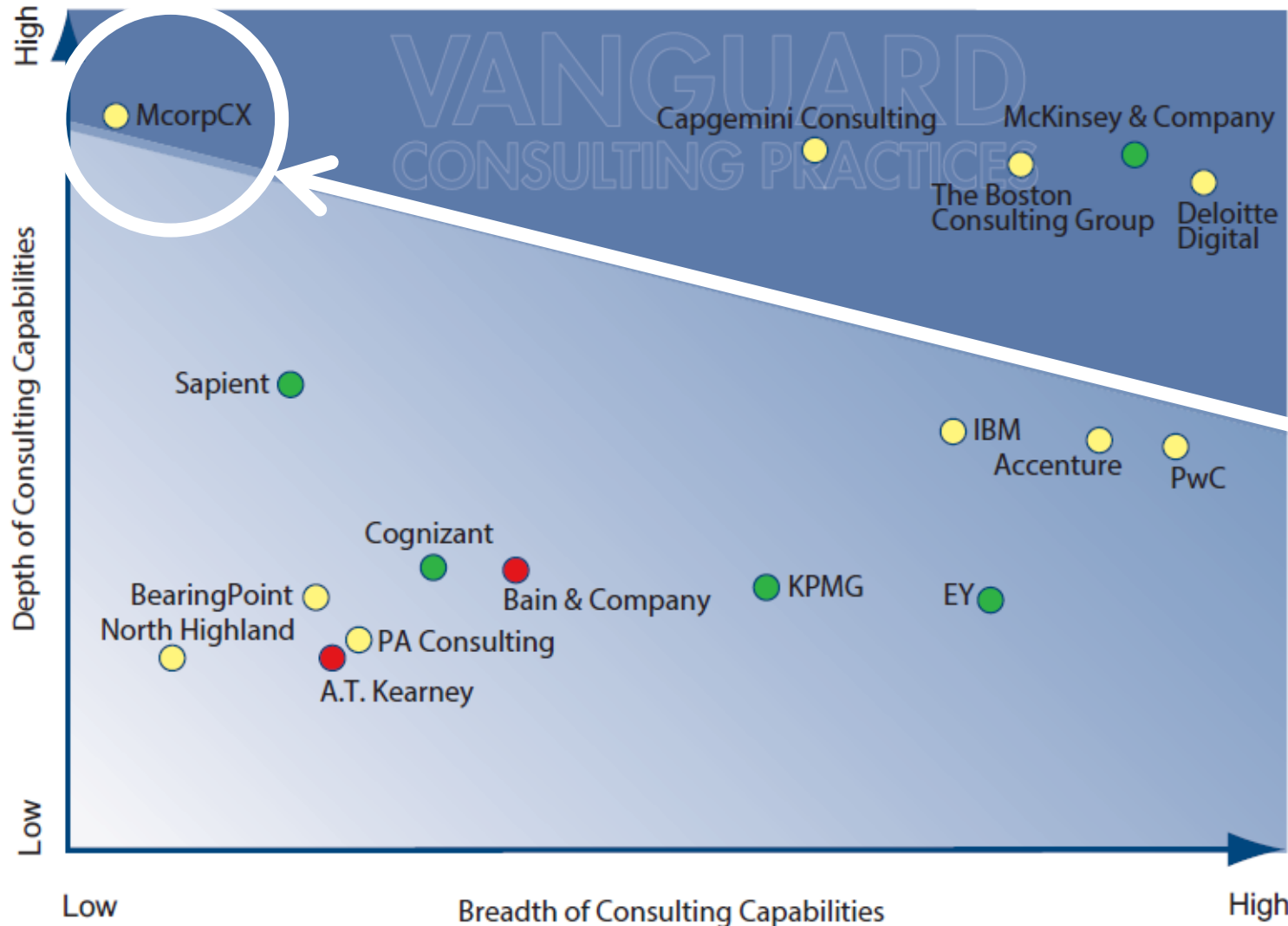
Linked to the actions, systems and capabilities to Improve

Build CXM Capabilities

Assessing maturity, defining implementation roadmaps and activating best-practice capabilities to help organizations deliver better business results.



Independently ranked Top-20 digital CX & strategy leader

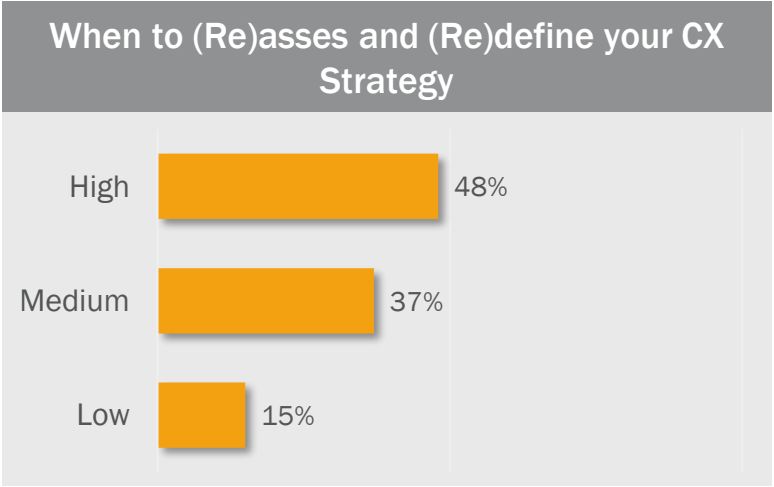
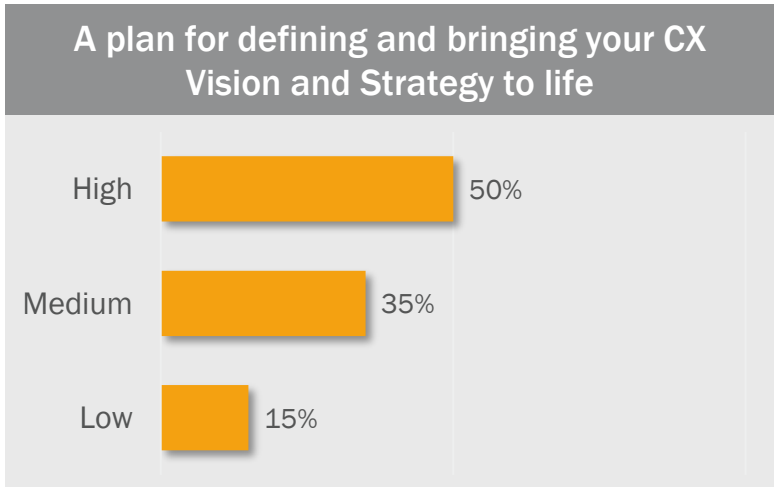
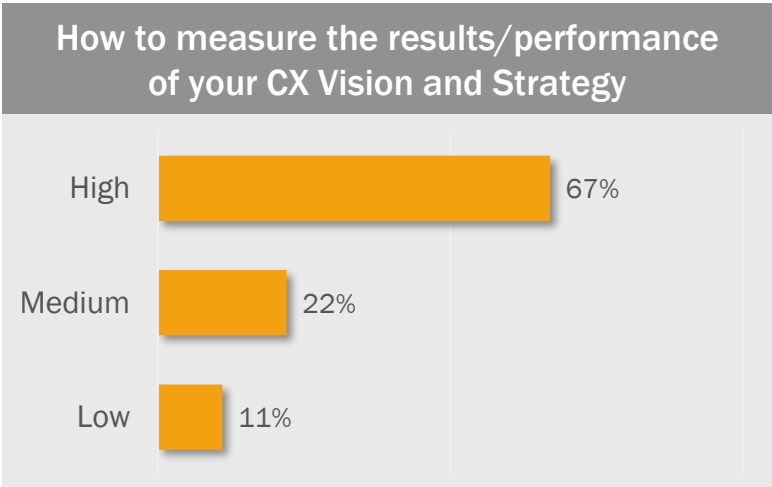


“[Their] narrow but deep market position enables McorpCX to effectively serve both the SME market and the largest global corporations”¹

-- ALM Intelligence:
The Kennedy Vanguard

Today's discussion: What you told us;
Linking CX vision and strategy; How
leaders build and leverage vision;
Bringing it to life; Measuring success;
The Vision Development Playbook;
Answers to your questions.

Survey Results: What are you most interested in?



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A customer-centric 'north star' to guide your actions...



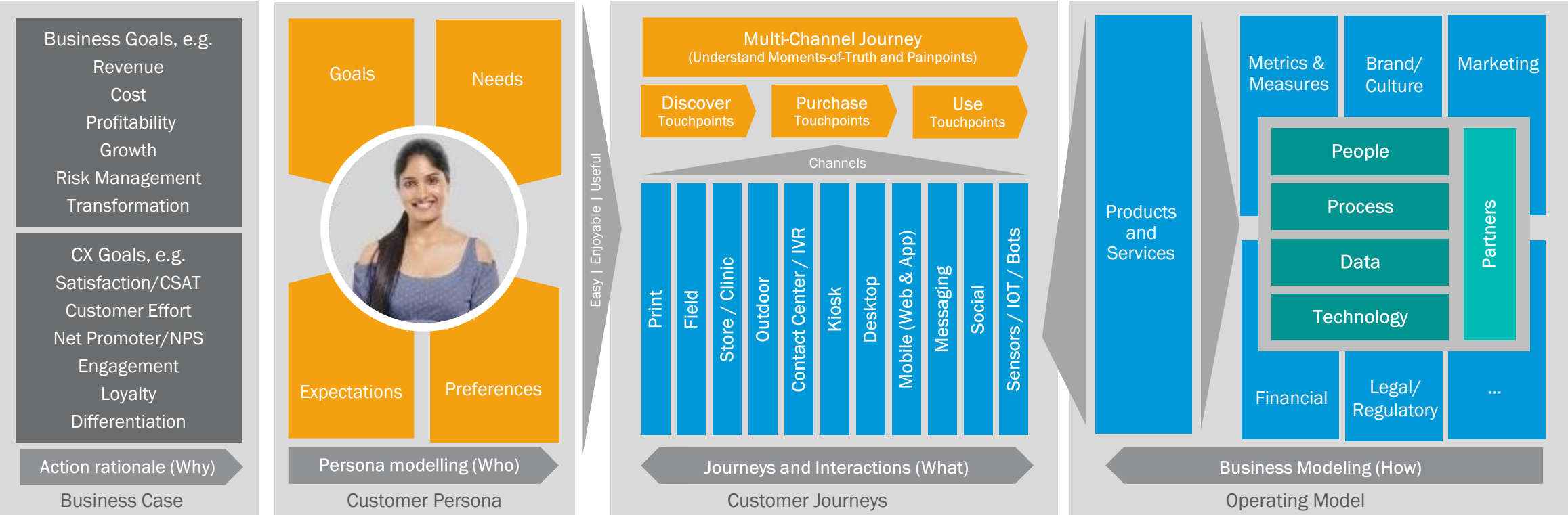
**How
Customers
Feel**

How We Behave

What We Stand For



Helping activate a customer-first operating model



**Your experience vision and strategy can
answer some fundamental questions, to help direct operations...**

- Who are our most important customers?
- How do we want customers to ‘feel’?
- How should our people behave?
- How should our systems align to audience needs?
- How do we plan and prioritize experience investments?
- Are we delivering the experiences our brand promises?
- What should we measure to assess results?

While vision is part of strategy, it's not the same thing

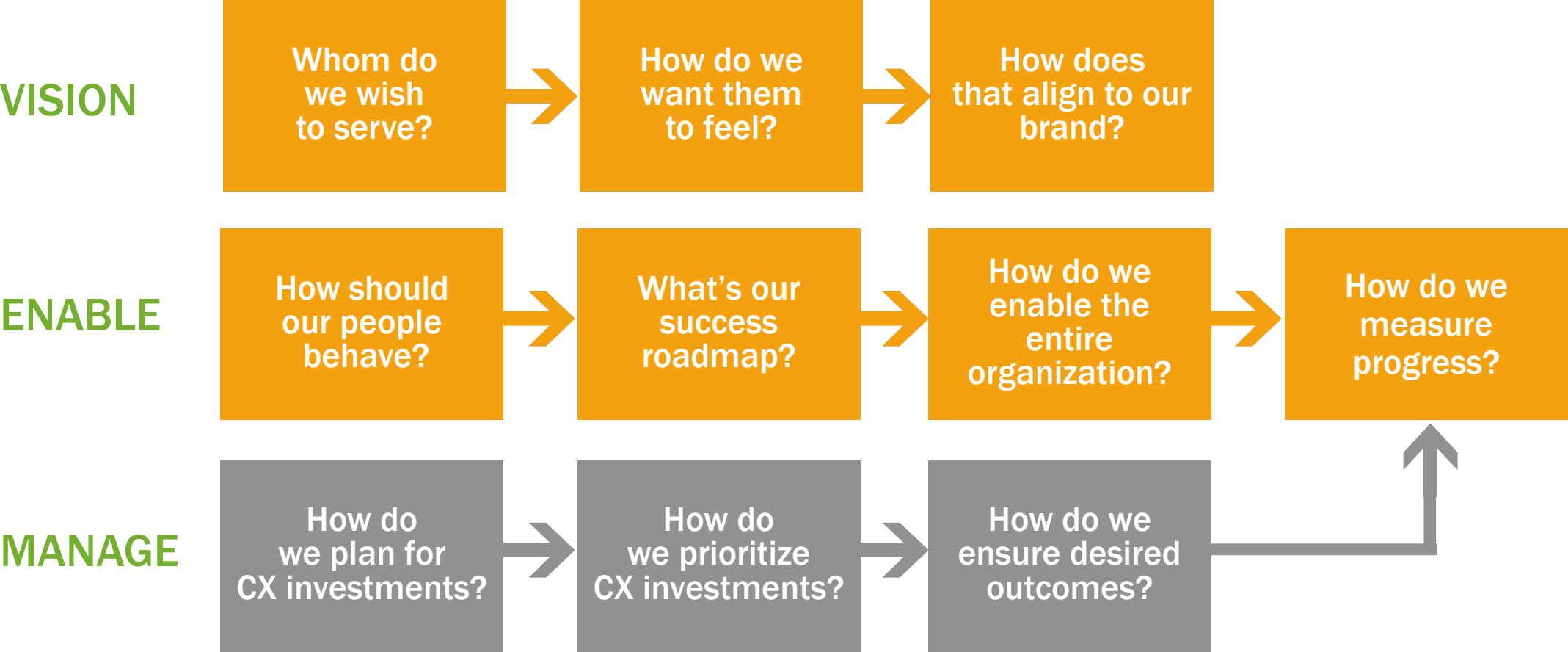
EXPERIENCE STRATEGY

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.

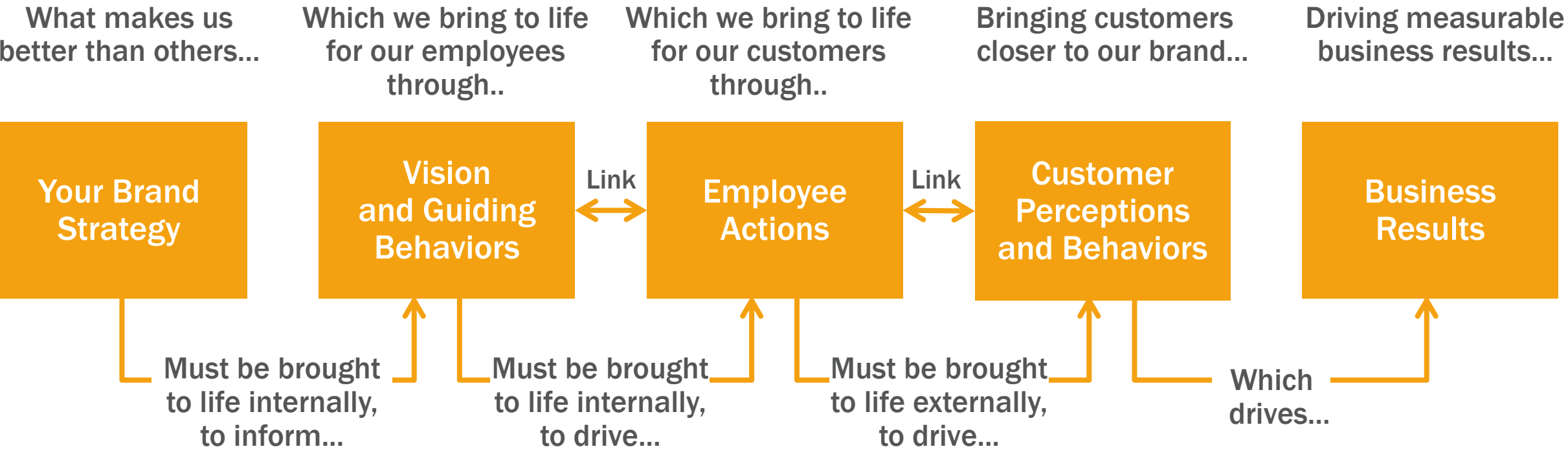
EXPERIENCE VISION

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.”

Vision sets the stage; Your CX strategy brings it to life



Articulated and brought to life, your experience vision will help to drive desired business outcomes



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Take steps to build the right vision for your organization

1.

Understand
what competitive
strategy drives
your economic
engine



2.

Understand
your promise to
customers, and
the experiences
they'll expect



3.

Align these
expectations to
experiences you
can differentiate
and deliver on



4.

Give your people
the guidance and
tools they need
to bring the
experience to life



We're going to model a leading consumer retail brand

A smiling woman with curly hair, wearing a white button-down shirt, is holding several shopping bags (one tan, one dark blue) over her shoulder. She is standing in a clothing store with racks of clothes visible in the background.

**Competitive
Strategy**

**Price/Value
Leadership across a
broad market**

**Brand
Strategy**

**The brands you
love for less in a fun,
friendly environment**

**Target
Customer**

**Fashion-forward
value seekers**

Articulating a CX vision that will bring the brand to life



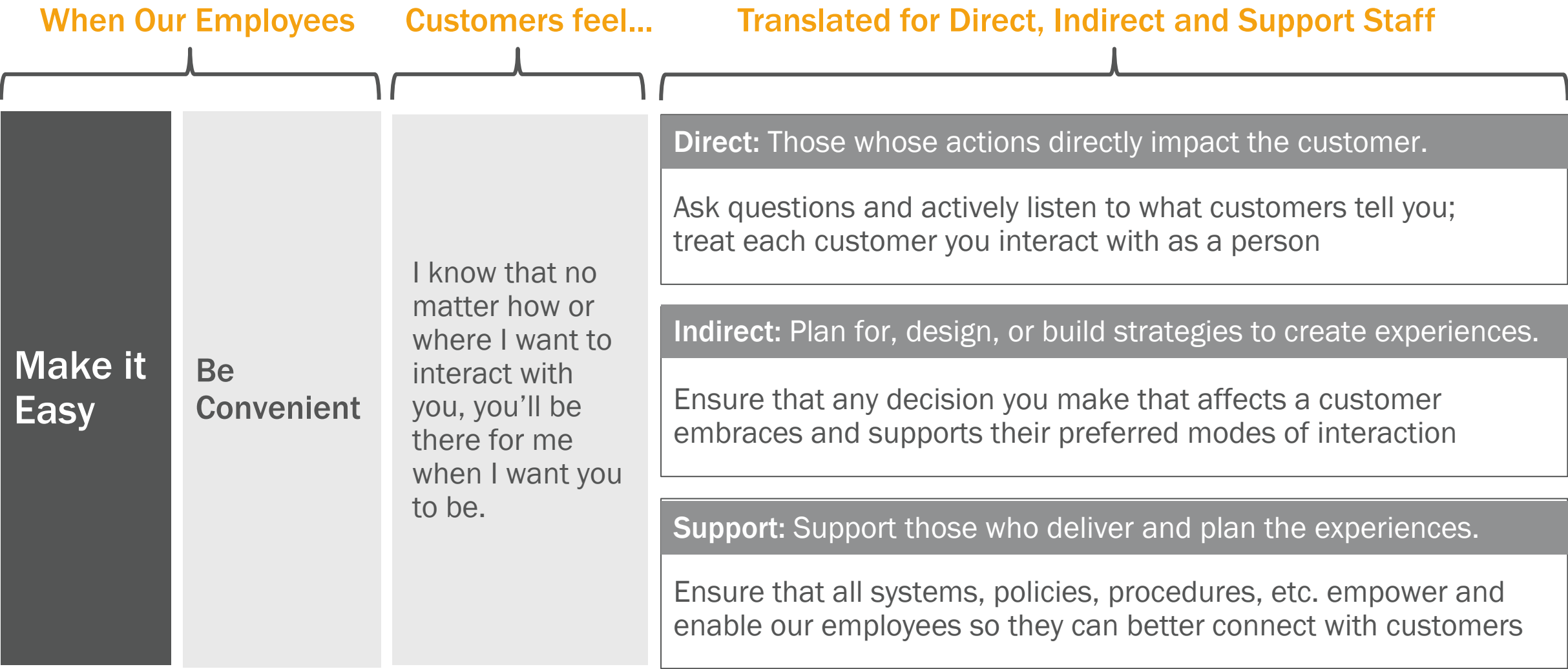
With guiding behaviors brought to life for your people

Guiding Behaviors	Customer Feelings	The Actions Our Employees Will Take to Drive How Customers Feel, Their Perceptions, and Their Behaviors
Make it Easy	Be Convenient	Understand what our customers need, and give it to them where they want it, where and how they want it.
	Help Me Achieve My Goals	Put yourself in our customer’s shoes, understand what they’re trying to accomplish and make it easy for them to do so.
	Make it Simple	Look for ways to make things simpler and more efficient for our customers – then make it happen.

Making customers feel exactly how they (and we) want

When Our Employees			Our Customers Will Feel	
Make it Easy	Be Convenient	Understand what our customers need, and give it to them where they want it, where and how they want it.	I know that no matter how or where I want to interact with you, you'll be there for me when I want you to be.	
	Help Me Achieve My Goals	Put yourself in our customer's shoes, understand what they're trying to accomplish and make it easy for them to do so.	You make the effort to know what I need, and show me you are invested in helping me make that happen.	
	Make it Simple	Look for ways to make things simpler and more efficient for our customers – then make it happen.	I can rely on you to eliminate complexity and know that if I run into problems, you'll make it easy to solve them	

Translated into action across all parts of your business



Validated throughout the process with all key groups



Articulating the experiences we plan to deliver

VISION

What customer experience should we deliver, to whom, and how does it make them feel?

Whom do we wish to serve?

Our strategic target are **Fashion- Forward Value Seekers**



How do we want them to feel?

That we are a **friendly, fun** place to shop.
A place where they can uncover **great values**.

That we **care about them and** make it easy to accomplish their goals.

And that we **make it easy** to discover, and buy, **great fashion**.

How does that align to our brand?

When our customers feel this way, they believe that we give them **the brands they love for less in a fun, friendly environment** in unique ways that our competitors cannot match

Guiding our people, systems, processes and activities

ENABLE

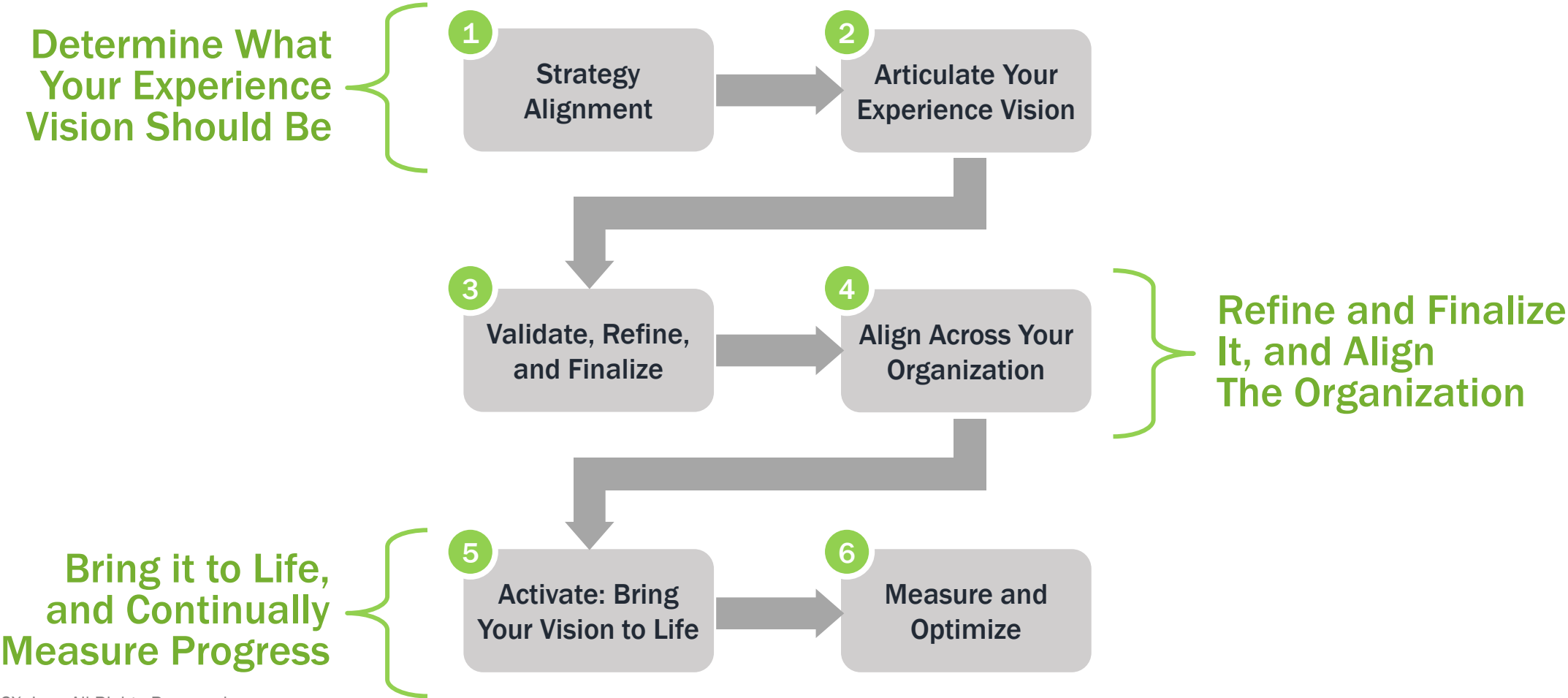
Knowing who we serve and what we want them to feel, how do we consistently deliver against this?



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A 6-step plan for bringing your Experience Vision to life

The Framework



Link to business and brand: Strategy Alignment

Questions to ask...

What is our topline competitive business strategy?

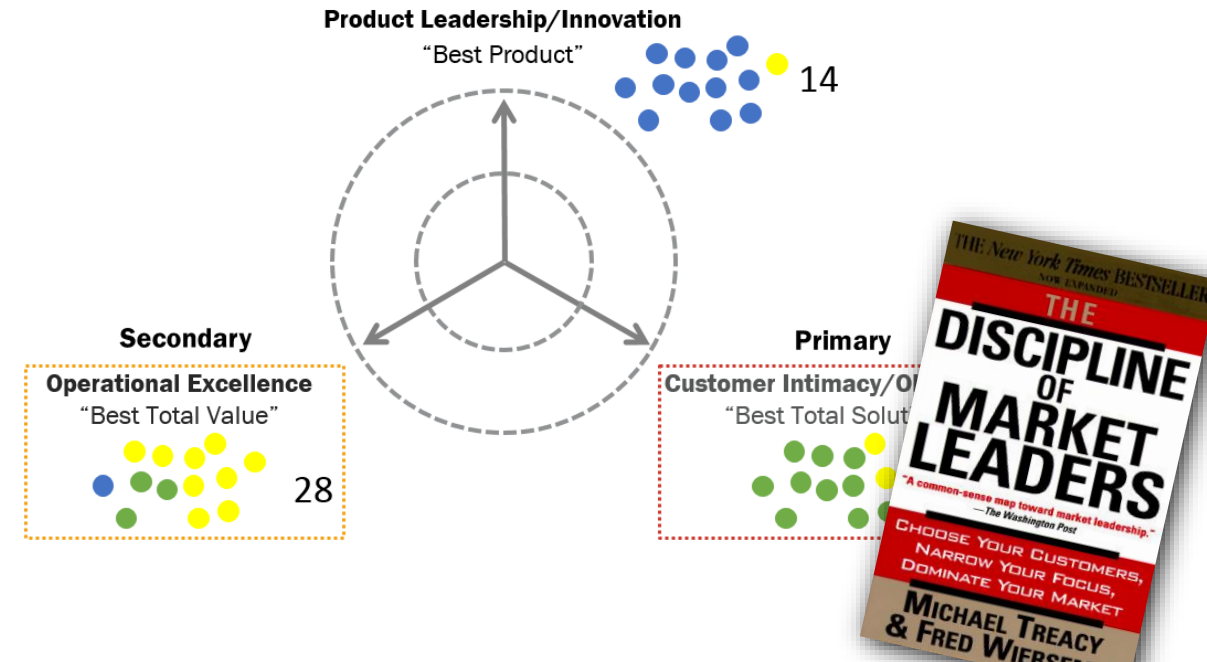
How do you differentiate? (The big three: Cost/Value, Product Leadership, and Customer Intimacy)

What do customers expect from us based on our brand promise?

Your promises set customers expectations of the experience they'll receive

One company's approach...

- **Executive Leadership Aligned and Agreed:** Focus on Customer Intimacy is the differentiator; will compete (on par with competitors) on Value and Innovation



Define what we stand for: Articulate your vision

Questions to ask...

How will this vision inspire and guide our people?
Is this something you can translate to desired perceptions, attitudes and behaviors across the org?

Will this help us deliver truly differentiating experiences?
If it would be easy for competitors to copy it, probably not.

One company’s approach...

- **Cross-functional working group:** Assessed brand and related attributes from the perspective of competitive differentiation
- **Draft vision created with a “CX Vision” card game** driving team alignment and priorities

Differentiate		Compete		Acknowledge	
Top Rated Attributes					
14	Make it right (committed to success)	20	Informed (understands my business)	16	Mobile Volume
10	Delightful Differentiation / Audience Intelligence / Insights	6	Effectiveness	11	Competitive Insights
5	Consistent / Dependable / Predictable	6	Execution Excellence	3	Innovative
4	Trusted	3	Value	2	Intuitive
2	Ease of access to marketing solutions	1	Customer Empathy / Caring	1	Corporate Citizenship & Philanthropic
1	Partnership				

<p>CX Strategy Concept: 22</p> <p>'Proactive'</p> <p>Anticipating and acting on customer needs - before they have to</p> <p>Description: Proactive action of the part of your organization - whether to address issues, introduce a new product or service, or to provide guidance on existing offerings...helps customers unlock immediate additional value from their relationship.</p> <p>CX Strategy Pillar Most Often Aligned to: Proactive Guidance</p> <p>© McorpCX Inc. www.mcorp.cx</p>	<p>CX Strategy Concept: 8</p> <p>'Empathetic'</p> <p>The ability to sense and respond to customers emotional needs</p> <p>Description: Empathetic experiences occur when your organization and your employees understand customers well beyond basic segmentation, and support their emotional wants and needs through attitudes, actions, and words.</p> <p>CX Strategy Pillar Most Often Aligned to: Tailored Intimacy</p> <p>© McorpCX Inc. www.mcorp.cx</p>	<p>CX Strategy Concept: 25</p> <p>'Insightful'</p> <p>Adaptable solutions and interactions based on rich customer understanding</p> <p>Description: Driven by a deep understanding and acknowledgment of the differences and similarities between not only segments, but between individual customers.</p> <p>CX Strategy Pillar Most Often Aligned to: Tailored Intimacy</p> <p>© McorpCX Inc. www.mcorp.cx</p>	<p>CX Strategy Concept: 17</p> <p>'Personalized'</p> <p>Customers feel experiences are designed "specifically for me"</p> <p>Description: Personalization means better serving your customers by giving them exactly what they want and need, when and how they want it. It allows you to provide benefits uniquely suited and designed for "each" customer.</p> <p>CX Strategy Pillar Most Often Aligned to: Tailored Intimacy</p> <p>© McorpCX Inc. www.mcorp.cx</p>	<p>CX Strategy Concept: 20</p> <p>'Transparent'</p> <p>No spin, nothing to hide - customers see all their data and how it's used to help them</p> <p>Description: The data gathering and analysis function is completely transparent to the customer, and perceived as high-value because it provides them "exactly what they need to know". No spin, nothing to hide.</p> <p>CX Strategy Pillar Most Often Aligned to: Data-Driven Insights</p> <p>© McorpCX Inc. www.mcorp.cx</p>
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Sharpen: Validate, refine, and finalize your vision

Questions to ask...

One company’s approach...

What ‘level’ of validation does our organization require?

You need leadership across the org to support the vision... make sure you have the insights to rationalize and defend it

What do our most important personas think?

Understand what matters most to your key customers, and know *why*

- Engage internal and external stakeholders
Refinement of the Vision and employee actions occurs after each step, with the inputs carrying over into the next



Understanding and buy-in: Align across the organization

Questions to ask...

How do we make our vision relevant for different employee roles?

Translate the vision into role-specific behaviors and actions for direct, indirect and support roles

How can we use it to bring our employees closer to our customers?

Articulate how customers will feel as a result of the experience being delivered

One company's approach...

- Make the vision relevant by translate it to different roles across the organization
“Now I know I have an impact on customer experience, and what to do to help...”



DIRECT:

Front-line staff,
Call Center, Sales,
and Service



INDIRECT:

Marketing, Digital,
Retail Operations



SUPPORT:

IT, Legal, Human
Resources

Activate: Bring your Experience Vision to life

Questions to ask...

Are we able to deliver on this?

Identify and close any gaps between customer expectations and internal capabilities to deliver against them

How do we translate our intentions?

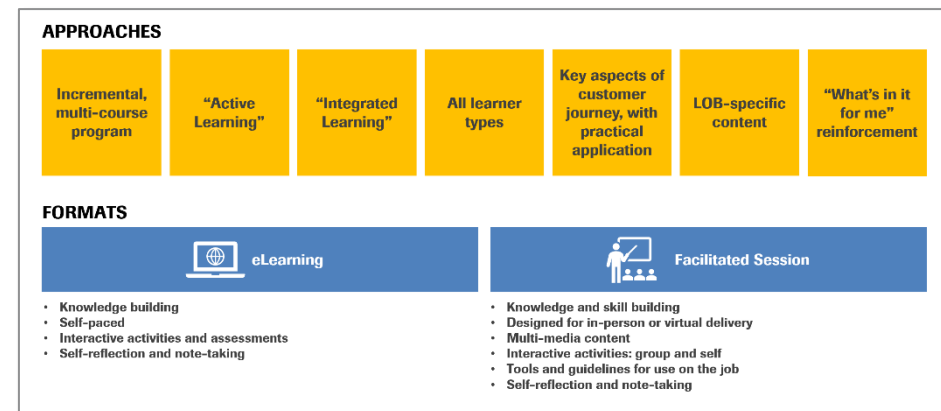
Enabling company-wide adoption of ‘guiding principles’ for your vision

How can we help our people deliver?

Give employees the authority, tools, and incentives they need to bring it to life

One company’s approach...

- Build a world-class CX training program
Delivered remotely across the entire org to 1,300+ employees, managers and leaders
- Active, integrated and collaborative
“...hands down, the best customer service training I have ever been to or seen...”



Drive to action: Measure and optimize

Questions to ask...

What drives customer perceptions?

Understand the operational drivers of positive and negative customer belief

Can we use existing employee and customer listening posts?

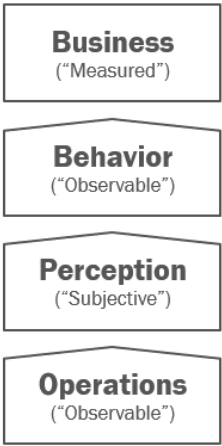
Yes. (Don’t start from scratch)

Where should we focus actions?

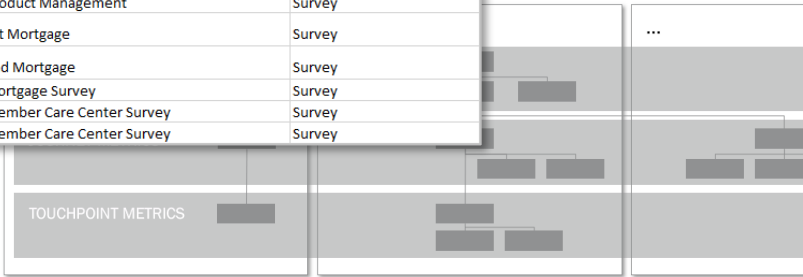
Prioritize quick-wins to improve and create prioritized backlog of initiatives

One company’s approach...

- **Leveraged existing VoC and VoE programs:**
Able to add select questions/data requests to existing listening posts for quick feedback
- **Expanded over time:** As linkages were quantified and performance improved



Status	Name of Listening Post	Listening Post Type
Current	Branch Transaction	Survey
Current	New Account and FSR transaction	Survey
Current	Member Service Survey-Member Care Center	Survey
Current	Secret Shopper	In person assessment
Discontinued	Product Management	Survey
Discontinued	1st Mortgage	Survey
Discontinued	2nd Mortgage	Survey
Requested	Mortgage Survey	Survey
Requested	Member Care Center Survey	Survey
Requested	Member Care Center Survey	Survey



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Bringing it to life; **Measuring success;**
The Vision Development Playbook;
Answers to your questions.

Designing a CX Vision Measurement program

Deconstruct
Your Vision

Map Current CX
Vision-Related
Metrics

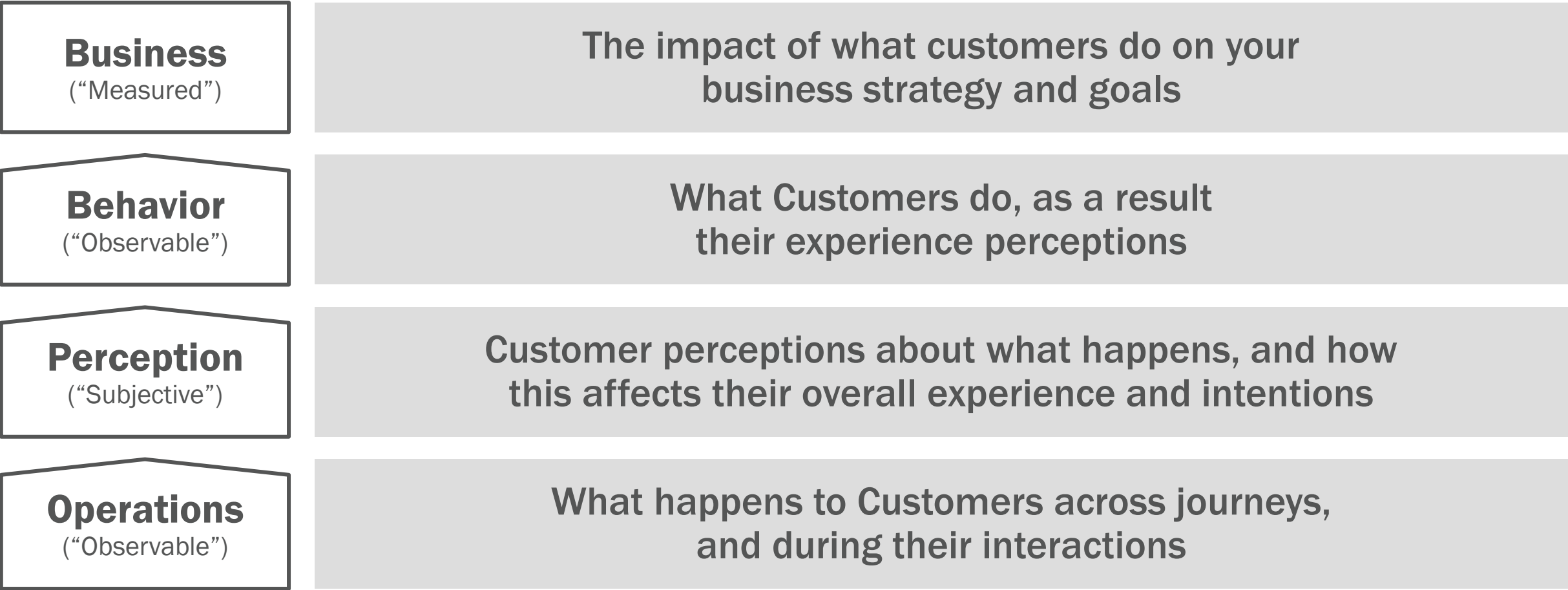
Leverage Existing
Listening Posts

Develop a System
for Distributing
Insights

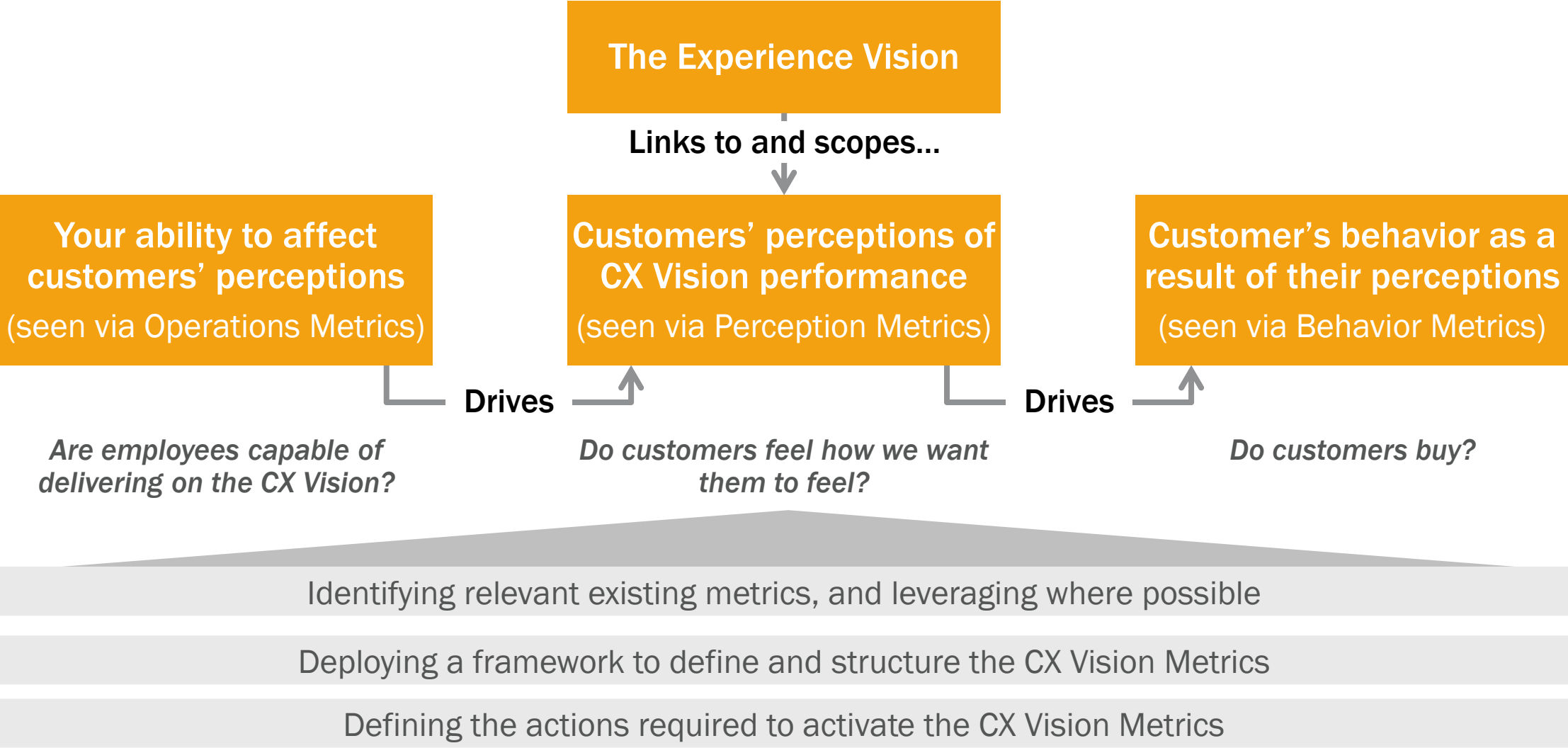
Develop a System
for Responding to
Insights

Optimize and
Improve

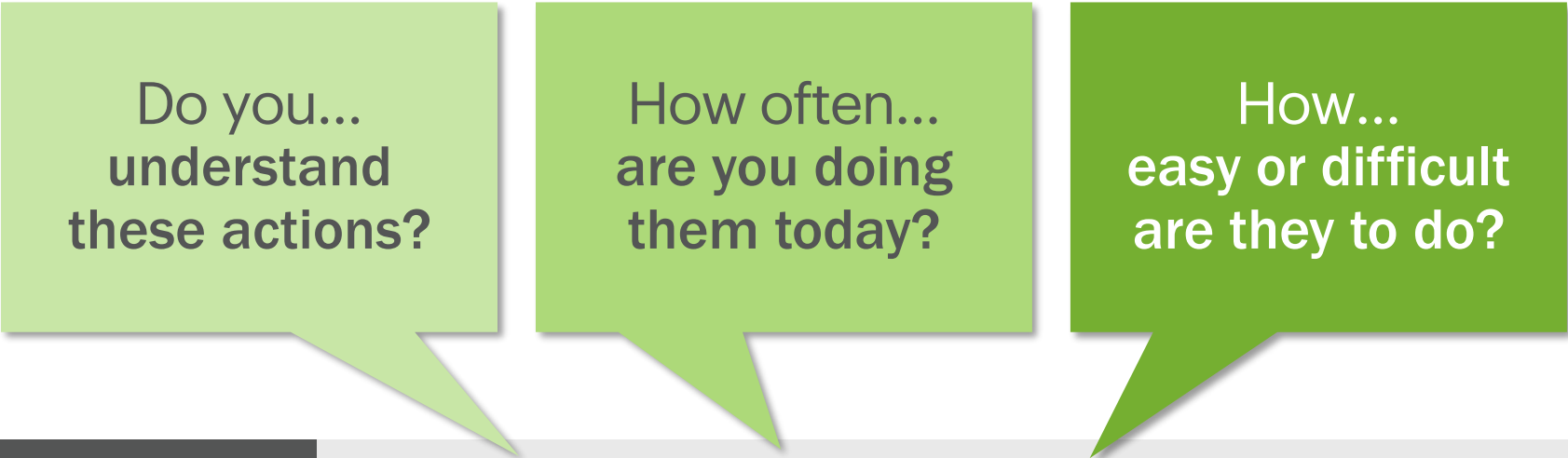
Linking CX vision components to customer feelings, perceptions and behaviors – and business results



For continuous improvement of CX Vision performance

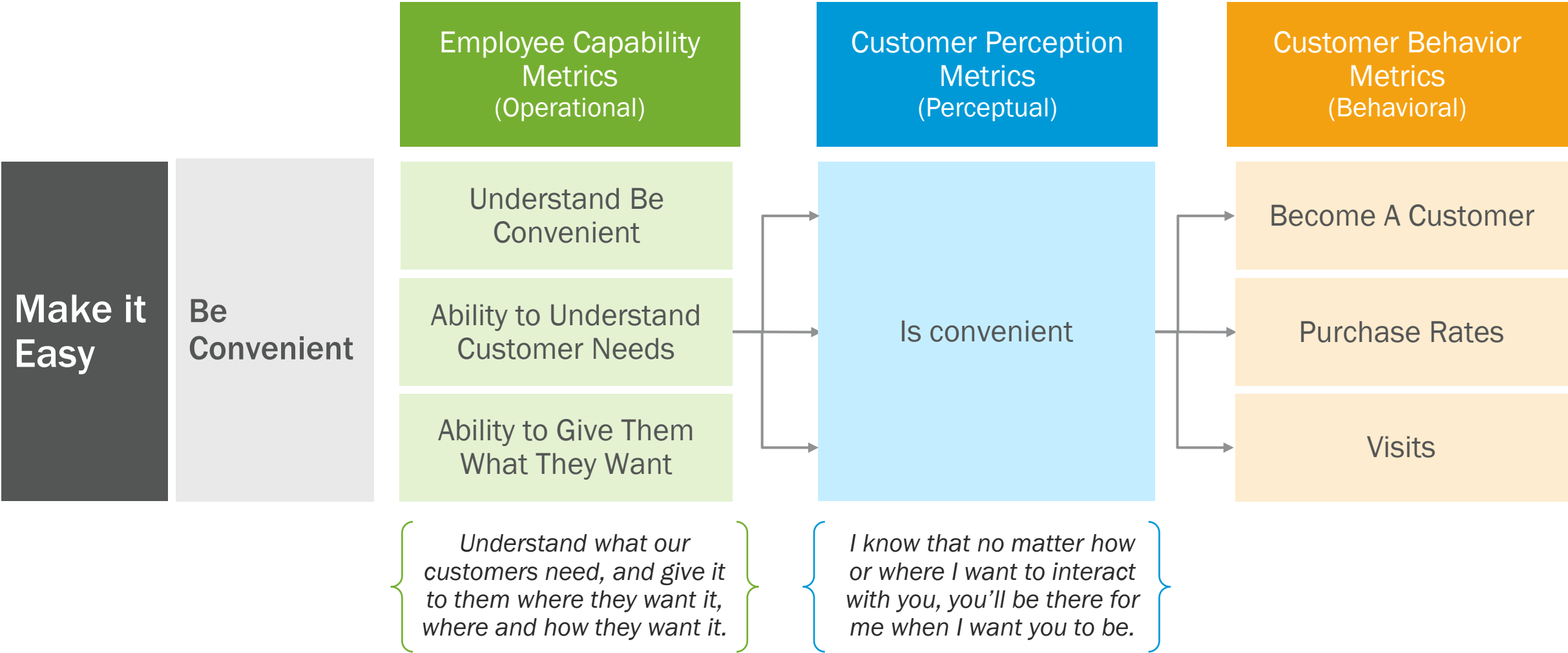


Evaluation of Employee Capabilities via surveys...



Make it Easy	Be Convenient	Understand what our customers need, and give it to them where they want it, where and how they want it.
	Help Me Achieve My Goals	Put yourself in our customer’s shoes, understand what they’re trying to accomplish and make it easy for them to do so.
	Make it Simple	Look for ways to make things simpler and more efficient for our customers – then make it happen.

Aligning Operation, Perception, and Behavior Metrics

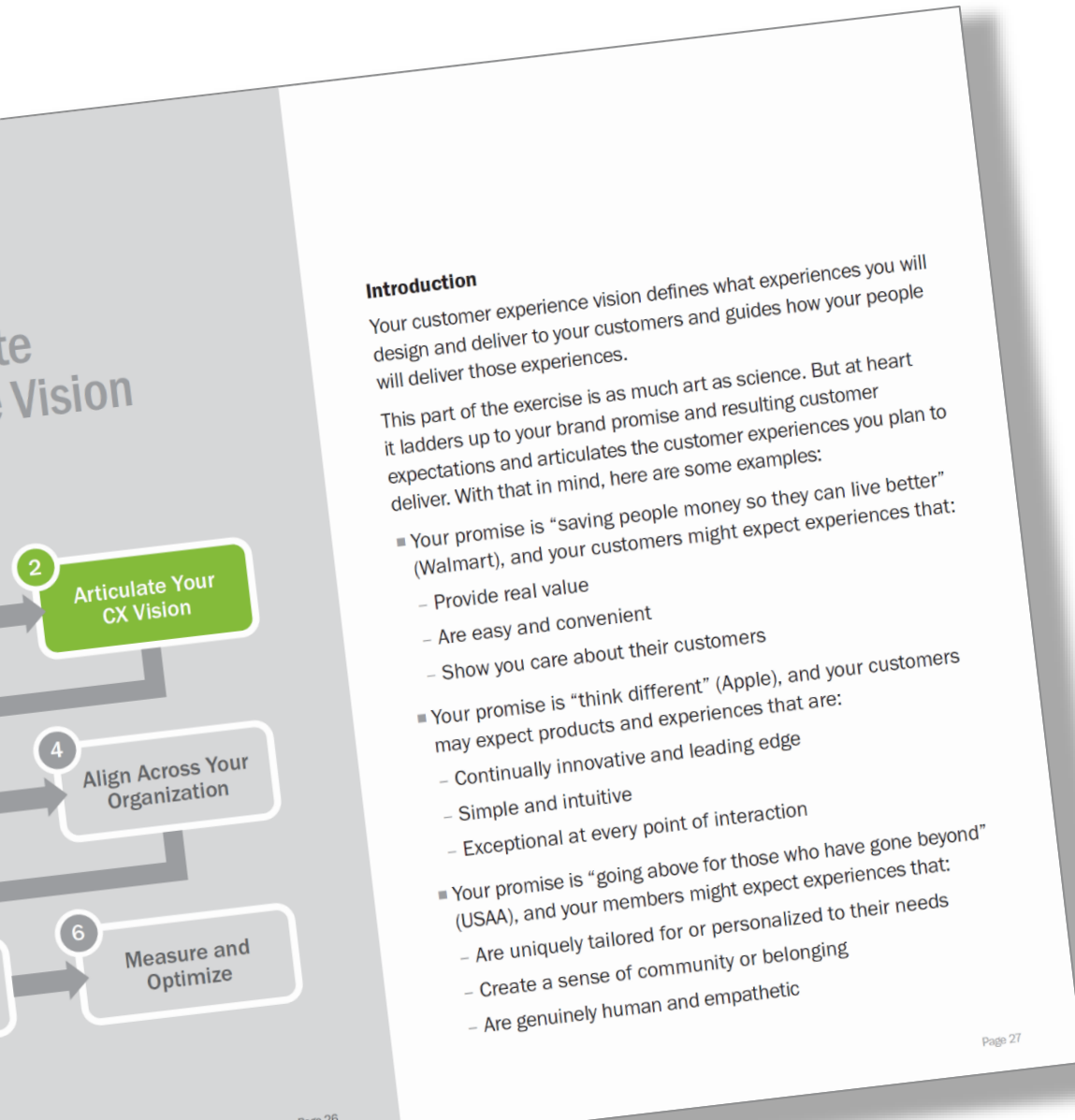


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The “North-Star Vision Development Playbook”



This vision development approach will help you to...



Bring your brand to life for ALL your audiences

Align business and brand strategies with experiences

Articulate how you design and deliver experiences

Align the entire organization around the vision

Ensure that your people understand their roles

Measure progress, and improve business results

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Questions? A fireside chat...



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