

Customer experience [CX]: Unlocking CX value for your business





“The customer’s
perception is
your reality.”

- Kate Zabriskie



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This workshop can help you start thinking about your businesses, how you can be more CX savvy and how to create a plan to manage the role of CX in your value system.

Workshop outline:

- 1 3 sessions.
- 2 Make it fit what your world can manage. Whether it is running 1 per week over 3 weeks or a half or whole planning day.
- 3 Go offsite if you prefer. Set it up to feel different if you can't. At the very least get someone to cover your phones and have nice snacks.
- 4 Consider getting a good facilitator in. If not then work together to get through it with respect and perhaps a few ground rules on what you agree is healthy communication.



A word before you start.

The highest performing businesses on the CX scale focus on the experiences of both the customer and the employee. Companies that fail to understand this crucial relationship rarely get the engagement necessary from their people to consistently walk the talk on the front lines. Experience creation is a culture-based response, driven by genuinely upheld values.

Successful CX programmes are top down initiatives, driven by leadership and embedded throughout the business, not owned by one division or role. CX

can become a powerful anchor point for joining up diverse sets of activities and aligning efforts. Those that lack organisation wide activation will fail. CX activities need to be mapped into personal KPI's and KPI's need to link back to the overall business dashboard – being incentivised, measured and celebrated as progress gets made. CX addresses all touch points leveraging all necessary technologies, from analogue to digital to human, empowering employees to use their heads and hearts to do the right things for customers in the moments that make the difference.





With the Dalai everyone
gets the same experience
of being seen.



By the end of these simple sessions you will:

- 1 Have some idea about CX logic and how to go about managing it.
- 2 Have some ideas and priorities for developing and implementing your own CX strategy.
- 3 Have a plan.



Session 1: The honest review. Twenty questions.

These questions are structured by CX logic. As you and your team ask yourselves the questions and debate your answers you will start to get the CX idea.

This session is run by asking each question and answering it honestly.



Put each question on a big piece of paper [A3 at least].



Get everyone to write their answer on a sticky note and put it under the question. There is no point in kidding yourself of defending what you have. Be brutally honest. That does not mean you can't notice good stuff. Please do.



Take the time to review and discuss your responses as a group and then create a summary statement as your answer.



1. Is customer centricity a viable strategy for achieving competitive advantage in our business?
2. Do we have a clearly defined customer value proposition?
3. Have we comprehensively mapped all our customer experience touch points and developed a plan for improving the overall integrated experience?
4. Do we talk to your customers regularly? Not just saying “Hi” but asking about their experience, what they need from us, and what we could improve?
5. Do we have a metric for our customer performance?
6. Do customers participate in developing solutions in our business?
7. Do the needs of the customer define our business priorities?
8. Do we know the value of our customers? And do we measure delivery on value to our customers?
9. Does our business have a business-wide customer experience strategy?
10. Does our business have an employee experience strategy?



11. Do our organisation's values drive our behaviours? Do any of them reference the customer?

12. Do our customer-facing teams have access to a steady flow of customer information that is turned into actionable information to improve customer experiences?

13. Is our organisation operating from a comprehensive map of customer centric business processes in order to prioritise the development of our competitive capabilities?

14. Do we have a calendar of activities to address critical priorities to improve customer experience?

15. Do we have a process for piloting and implementing new ideas and/or systems to improve customer experience, value and return on investment?

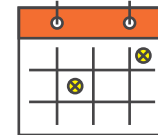
16. Do we make the lives of customers [and partners] easier through well-designed digital/web-based and/or mobile systems and tools?

17. Are our team members plugged into business systems that make it easier for them to service customers?

18. Are our team members fully equipped with access to reliable, integrated mobile productivity and analysis tools, regardless of where they are working, in order to understand and respond to customers?

19. Do our customers have access and incentive to update information in our systems as part of our network of customer intelligence?

20. Have we completed a comprehensive digital security assessment and implemented a continuous, proactive security plan for our business and our customers?



Unless you are already deeply customer centric – and in which case why would you be doing this work – then what you will have in your answers is your current-state map of how well you are set up to manage CX.



Session 2: What is it telling you? The SWOT.

Let's take it as a given that your answer to question 1 was yes.

Ask the team:

- 1 What are the insights to be learned here?
- 2 Are we strong in some areas and weak in others?
- 3 What have we learned about ourselves and our customer relationships?

Do a SWOT analysis.

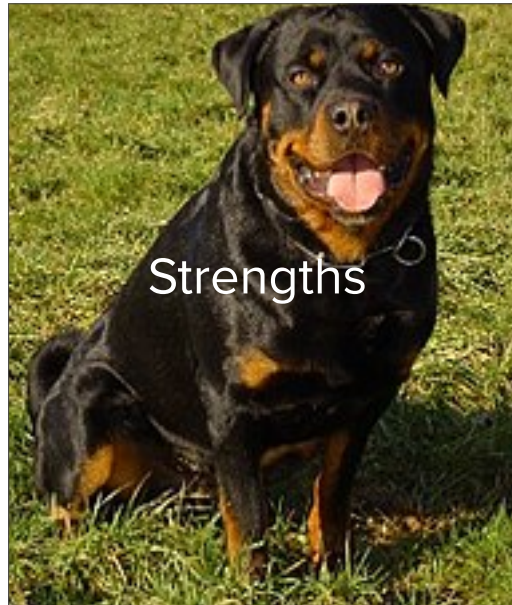


SWOT Analysis:

These examples are here to help you think but work out what's right for your business and situation.

Strength examples

- Advantages of your value proposition?
- Capabilities you have others lack?
- Competitive advantages?
- USP's (unique selling points) proof points?
- Resources, Assets, People of note?
- Experience, knowledge, tools, data?
- Capital? Financial reserves?
- Marketing – channels, reach, distribution, awareness?
- Innovative aspects of your offer?
- Location and geographical?
- Price, reliability, value, quality?
- Accreditations, qualifications, certifications, awards?
- Processes, systems, tech know how, IT, communications?
- Culture and values?



Weakness examples

- Disadvantages?
- Gaps in your skill sets or capabilities?
- Lack of competitive strength?
- Reputation, presence and reach?
- Financials?
- Any other vulnerabilities?
- Timescales, deadlines and pressures you are under?
- Cashflow, start-up cash-drain?
- Continuity, supply chain reliability?
- Reliability/integrity of systems, resources, data?
- Culture, morale, commitment, leadership?
- Gaps in accreditations?
- Lack of processes and systems?
- Lack of succession plans?



Opportunity examples

- New local or global market developments?
- Competitors' vulnerabilities?
- Industry, market or lifestyle trends?
- Technology development and innovation?
- Global influences?
- New markets: vertical, horizontal?
- Niche target markets?
- Geographical, export, import?
- New USP's or innovations to existing offer/s?
- Business and product development?
- Information and research?
- Partnerships, agencies, distribution?
- Volumes, production, economies?
- Seasonal, weather, fashion influences?



Threat examples

- Political effects?
- Legislative effects?
- Environmental effects?
- IT developments?
- Competitor intentions - various?
- Market demand?
- New technologies, services, ideas?
- Vital contracts and partners?
- Sustaining internal capabilities?
- Obstacles faced?
- Insurmountable weaknesses?
- Loss of key staff?
- Sustainable financial backing?
- Economy - home, abroad?
- Seasonality, weather effects?

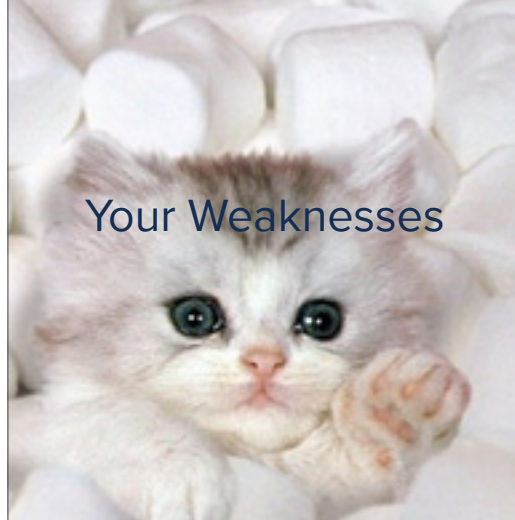
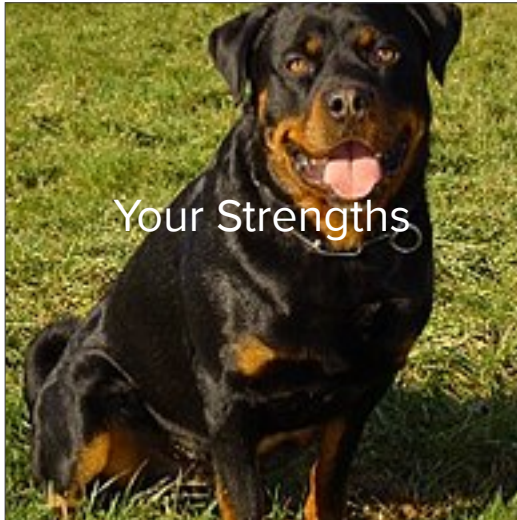


SWOT Analysis:

Now create your own.

Internal

External



Session 3: Where to from here. Building your roadmap.

This session takes a synthesised version of the questions from session 1 to ask new questions that you need to answer in light of your SWOT.

Do our organisation's values or their implementation need work?

Do we need to do work on our customer value proposition?

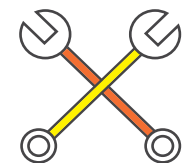
Do we need to review the way we define our business priorities?

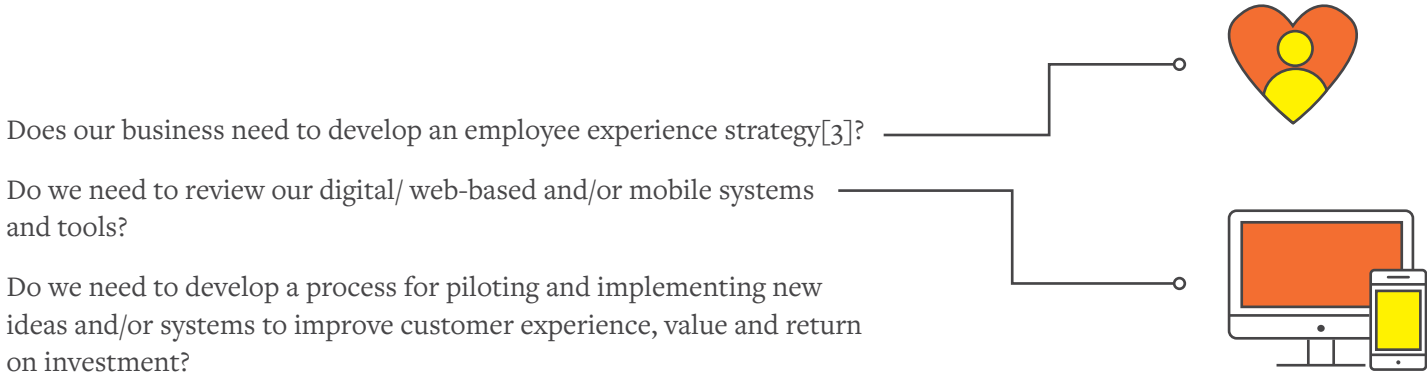
Do we need to do work on our map of our customer experience touch points[1] and the relationship of those to our business processes?

Do we need to set up regular customer feedback mechanisms?

Do we need to work out the value of our customers[2]?

Do we need to develop a business-wide customer experience strategy?





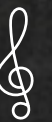
For every yes – put that question up on a whiteboard and then rank them in priority from 1 – 10.

Use these rankings to create your CX project plan in the form of a calendar of activities to address your critical priorities to improve your management of customer experience.

One of the simple most effective keys to success is make a plan and act on it.

That's it. Make your plan visible. Put it on the wall and revisit it weekly. Invite customers to comment on it. Mark progress. Get customers to mark your progress. This is what we call the weight watchers method. When you make a commitment and have to front up to be checked for progress it impacts your actions.

Celebrate progress.
Review. Learn.
Implement what
you learn.

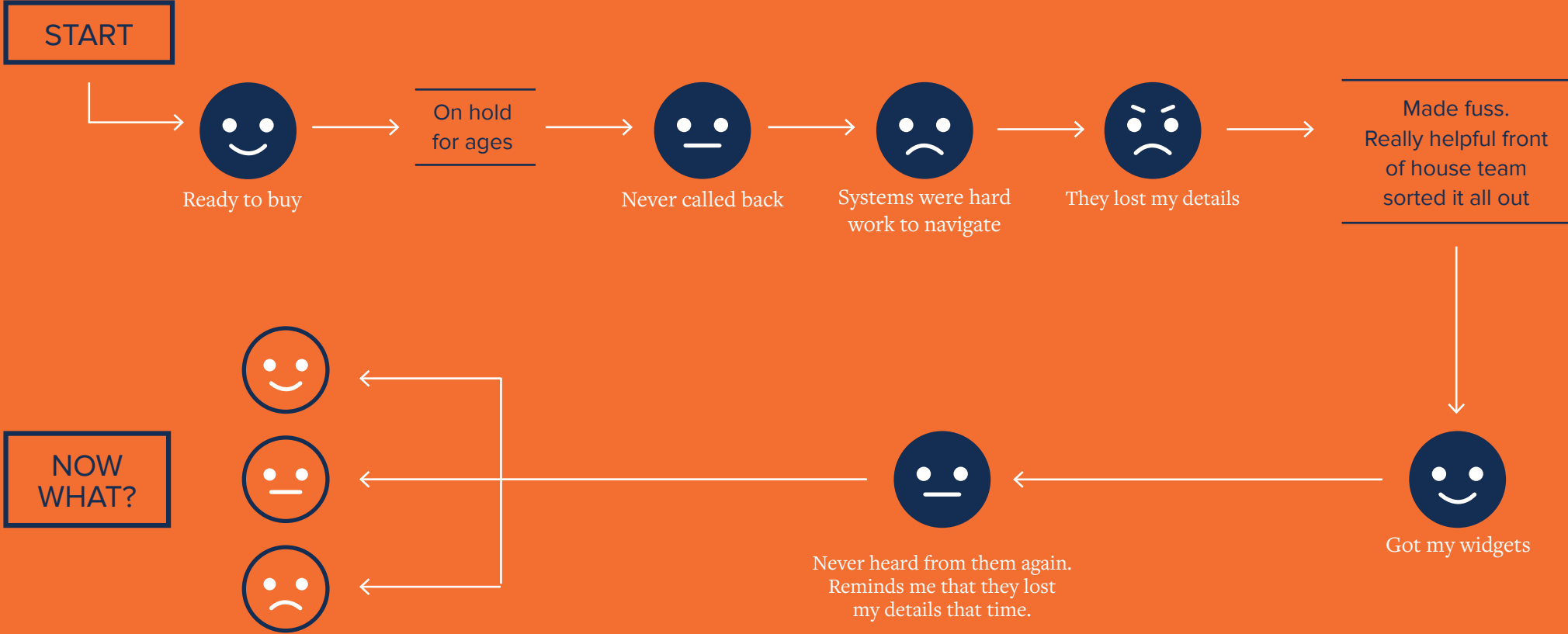


References

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2. How to measure customer value:
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3. Developing your employee experience strategy:
hbr.org/2016/12/design-your-employee-experience-as-thoughtfully-as-you-design-your-customer-experience



Mapping Your CX Hotspots The emotional journey



- Interacted with your marketing.
- Interacted with your systems and objects.
- Interacted with your people.
- Communicated your repeated failure to others.
- Interacted with your reputation.
- Communicated your failures to others.
- Communicated their success to others.

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