



Charting the route to CX success

Under promise, over deliver...

Customer centric organisations are applauded for their ability to deliver on the promises they make to their customers. They attract and retain customers, even in the most competitive of markets, by meeting and exceeding customer expectations. They achieve this goal by ensuring that everyone within their organisations knows what promises have been made, their role in delivering a great customer experience (CX) and that they are empowered to go the extra mile. They share their vision for CX success in a Customer Charter.

What is a Customer Charter?

In simple terms, a Customer Charter highlights the promises an organisation makes to its customers. They are used by private sector businesses and public sector bodies alike. It is often a formal document, listing the standards that the organisation commits to uphold as well as desired outcomes for everyone interacting with the business. The key messages an organisation shares and promotes about its products and services – whether via advertising, online or everyday dealings with customers on the frontline – we suggest also falls under the same heading.

Whatever is included in an organisation's formal Customer Charter or messaging, it's imperative that everyone working for the organisation understands that the promises made to customers create an expectation for the minimum level of service they should receive.

Why do organisations have Customer Charters?

A Customer Charter is an outward signal that an organisation takes the quality of its customers' experiences seriously. Externally, it demonstrates the organisation's confidence in its ability to make promises and its intention to keep them. Internally, it guides employees,

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signposting the skills and procedures expected of them to help deliver on the promises made. In this respect, Customer Charters are a useful way for an organisation to express its CX vision and set goals to deliver a supporting strategy or action plans.

A Customer Charter can play a central role in putting CX research and insights into action. For instance, if customers report that contact centre waiting times are too long, one of the Charter's promises might be to respond within a minimum timeframe.

Sometimes an organisation has a Customer Charter primarily for communications or PR purposes. Sometimes they are published in the hope that good CX will follow. And sometimes they exist simply to tick a box. These are not the best starting points for developing a Customer Charter which could make a major contribution to the success of the business, if done correctly.

How to make your Customer Charter a success

We've established that a Customer Charter should be regarded as a clear sign that an organisation takes CX seriously. However, it isn't a silver bullet: having one doesn't automatically make an organisation customer centric.

Developing a successful Customer Charter requires a vision for CX and a supporting strategy. It should align the organisation's holistic CX ambitions, customer needs and expectations, and the internal resource required to deliver great experiences.

A Customer Charter should comprise:

- An overarching promise (e.g. we put customers at the heart of everything we do)
- Customer expectations and needs, translated into clear promises against which the organisation can reliably deliver, all underpinned by knowledge of current performance and customers' priorities.

Organisations should be guided by their CX insight and understanding to arrive at a tailored list of promises. A knowledge review will uncover what is important to customers, what it already promises (even informally), and what the organisation needs to do.

Understand what's important to your customers:

1. What promises and guarantees are customers looking for from your organisation? Both day-to-day and when things go wrong.
2. What are your customers top priorities? What drives their satisfaction levels or likelihood to recommend?
3. How do customer needs and expectations vary by customer type?
4. Do you know what excellence looks like to your customers? How can you surprise and delight, or go above and beyond?
5. What are competitors doing well? What are they doing badly? How will the Customer Charter differentiate you from your competition?

Focus on what you need to do

- Against customer priorities, what do you need to improve as an organisation? What is the gap between ambition and reality?
- How engaged is senior management or head office? What promises will they commit to?
- How customer centric are your staff? Do they know their role in improving customer experience? What stops them from meeting the promises your organisation makes?
- If you feel a Customer Charter will need to do a lot of heavy lifting in terms of focusing employees on customer centricity, what supporting actions or training need to be in place?
- What promises are you already making to customers? Do these vary by department?

Once agreed, a Customer Charter needs to be shared externally and internally to be effective. Yes, customers need to hear what you are promising but employees need to know it first. That way, they will understand what customers expect from them in terms of service and what your organisation expects of them when doing their role, BEFORE you make your promises.

Customer centric organisations make clear promises to their customers, which are understood and actioned by employees internally. The expectations set by these promises should always be met and ideally exceeded.

Success can be measured via the CX metrics that an organisation monitors, for example, its CX insight programme, positive word-of-mouth on social media, employee satisfaction scores, and so on.

What makes a Customer Charter fail?

Not every organisation is able to align its CX ambitions, customer needs and internal resource in a Customer Charter without any challenges or obstacles in its way.

For some, the creation of a Customer Charter can be problematic from the start. In other cases, a well written Charter can fail because it is not reviewed and updated as the market, organisation or customer needs change. Whereas, the best Customer Charters bring everything into alignment: your entire organisation's vision and strategy, your customers' needs and expectations, and your employees' ability to deliver.

Some of the main pitfalls to avoid when creating a Customer Charter

- Copying another organisations' Customer Charter and trying to make it fit your business.
- Not involving enough people in developing your list of promises so that the Customer Charter reflects too few views and/ or contradicts the promises already being made by different departments.
- Involving too many people so that the Customer Charter is watered down and doesn't make clear commitments.
- Not communicating the Customer Charter - both externally and internally - once it is agreed.
- Relying on messaging to make your promises rather than a single document - but failing to keep track of what is being said, who is saying it and to whom.
- Making the wrong promises by writing a Customer Charter without a proper CX knowledge review.
- Not understanding the gap between customer expectations and your ability to deliver, leading you to write a Customer Charter that overpromises and cannot be delivered by staff, or that staff cannot endorse or readily buy into.

Key to an effective Customer Charter

Customer Charters need to be engrained and embedded in every aspect of an organisation. Every employee needs to understand the promises being made and what that means for them in their role. They need to be empowered to deliver on the Customer Charter. Consider featuring it in new employee inductions, reviews and company training. It should

also always be visible across the organisation, for example on intranet pages or posters.

Organisations that are truly customer centric make clear promises that are well communicated, and they strive to meet the commitments they have made.

Our top five tips:

1. *See the development of your Customer Charter as an output of your CX work, rather than a starting point.*
2. *Make sure the promises you are making reflect your unique organisation and its customers, and no one else's.*
3. *Communication is key. Tell your customers what you are promising but be sure that your staff understand their part too.*
4. *Be ambitious but realistic. Keep it simple and understandable to everyone. And, don't make promises you can't keep!*
5. *Recognise that your Customer Charter is not carved in stone. It must flex as times change.*



Beehive Research

Beehive helps Customer Experience, Insight, and Executive decision makers listen to and understand their customers and prospects. We provide clear and succinct insights that our clients use to make informed decisions on how to improve the commercial performance of their business. We are specialists in the 'premium products and services' marketplace, helping these brands understand their customers and prospects across the entire product lifecycle; from product and service development to marketing and communication messaging, and measurement of their customer's experience (CX, VoC & CSat). That's why we've been trusted partners to so many leading multinational companies across the globe.

If you'd like to find out more about Beehive's approach to Customer Charter best practice, contact us on:

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