Optimising the impact of your CX programme

CX impact is driven by more than just measuring and reporting

Customer Centric organisations understand that customer experience (CX) is a journey, not a destination. They understand that there is no value in establishing a CX baseline that merely tracks a metric and produces some pretty graphics.

So how do they deliver business impact?

They focus on taking a holistic view and ensuring that every part of their CX programme is delivering maximum impact.

What can you do to achieve real business impact?

Leading CX organisations don't just monitor feedback; they fully embed it within an overarching CX strategy to which all senior people are fully signed up and committed to deliver. Staff are fully aware and invested in the programme and its importance.

Impact doesn't just come at the end of the programme, it is built in from day one

HOW TO CREATE CX IMPACT

- STRATEGY
- EDUCATE & TRAIN
- INCENTIVISE & REWARD
- INTERNAL & EXTERNAL
- CHOOSE THE RIGHT METRICS
- TARGETS & BENCHMARKS
- SHARE & COMMUNICATE
- FOCUS PRIORITISE & ACT
- ASSESS THE IMPACT
- ADAPT & CHANGE

How to embed CX in your business for maximum impact

At the core of every impactful continuous CX improvement programme is a commitment from the outset to the creation of a company culture that places CX at the centre of everything it does.

Overall responsibility for this usually falls to the company's CX lead but not every organisation has one, or a CX team. The programme might be led by the Marketing or Insight team, or another head office function. In larger businesses there will ideally be CX champions to promote the programme and engage colleagues at all levels, from the c-suite to the frontline.

Business strategies are typically written for and by the Board. However, for maximum buy-in, it is important to translate strategy into words and actions that make sense to more junior and frontline staff.

Set out a clear CX strategy

Before embarking on a continuous CX improvement programme, it's imperative that a well-defined CX strategy is established with clear cut aims and goals. It should set out the business objectives and provide a strong vision of the destination but not necessarily the precise journey. For example:

- Where are you now and what level of customer centricity/maturity you want to achieve in five years' time?

- What targets or goals are you going to strive for, how will you know you've achieved them, and what benefits do you expect to see?

- Who needs to be involved, who is taking ownership?

- What skills do you have internally and what external support will you need?

- What barriers/issues can you already identify and mitigate?

Educate, train and empower staff

Education, training and empowerment are at the heart of any high performing CX organisation. What these organisations understand is that, with many customer touchpoints, there is no one department, or person, that can satisfy all customers. It has to be a collective and collaborative

CX requires a collective and collaborative effort

effort, where employees at all levels understand the organisation's CX strategy, their role in it, and how their effort can have an impact on business success.

To achieve this however is not simple. It requires real effort and drive from the very top of the organisation to embed CX in the business and bring staff on the journey.

To maximise engagement and increase the impact staff can have on customer experience, we've distilled seven key things top CX organisations do to embed CX within their staff.

ONBOARD
Ensure staff are properly onboarded into the CX programme. Ensure they understand and are 'bought in' to the process.

UNAMBIGUOUS
Keep it simple, avoid jargon, explain in clear, unambiguous terms.

RELATE
Ensure staff can relate their actions to impact and outcomes that will make a difference.

TRAIN
Train and educate staff; some may require specific training if they are frontline, but all should be educated. Make training material accessible.

EMPOWER
Empower staff, giving them knowledge and authority to act and make decisions enables first time resolution of issues, one of customers' biggest gripes.

ACCOUNTABLE
Make staff accountable and responsible for taking action. Ensure accountability is clearly defined and understood.

MONITOR
Monitor performance, provide feedback and ensure a continuous learning cycle.

Incentivise customer experience

To help embed CX into the business, some organisations link employee incentives to their CX results, and they do it in a way that complements their structure and goals. However, care and consideration is needed, as it can be more complex than simply rewarding staff for excellent performance.

You need to decide whether you incentivise based on:

- A company-wide, department-level, or team rating vs. an individual's service rating, OR

- CX scores sitting alongside other metrics vs CX scores standing alone, OR

- Not at all

Whatever approach is adopted, there are other considerations to assess :

- Could there be resentment, or disappointment, if a group linked incentive isn't achieved, due to some staff not 'pulling their weight'?

- How to incentivise customer facing frontline staff vs backroom staff?

- How much incentive is linked to service scores, and how much on company financial performance?

- What type of incentive; cash bonus, employee of the month, additional holiday?

A word of caution

Service agents may be tempted to ask for a good score or high rating, implying that their bonus depends on it.

The issue here is that if the customer feels sorry for the person they may give a higher rating than intended. Equally problematic, it could backfire on the agent if the service was poor. Either way, employees that try to bias the response can provide the organisation with a false measurement.

Take a holistic view, engaging internally and externally

Leading CX organisations understand that a proactive and holistic approach to understanding what customers want, and taking action to deliver products and services that meet that demand, will help them build a thriving business capable of long-term growth.

Are you listening to the internal voice as well as the external one?

However, to achieve this holistic approach, they also understand that you can't only rely on external feedback. These organisations know that it is critical to engage internally, as well as externally, and speak with employees and stakeholders, in addition to customers and prospects.

We cover this subject in more detail in our guide: *'Promises, expectation and how to avoid the CX Gap'*

Choose the right metric

So much has been written about the different CX metrics and how one outperforms another, is a better predicter of ROI, or gives clearer insight into the customer. The reality is they are all tools used to measure an aspect of CX, and used in the wrong situation or touchpoint they can have an impact on the quality of insight delivered.

What is critical is to understand the customer journey fully: the various touchpoints and the moments of truth. The CX programme should be designed from a strategic perspective, not a tactical one, with careful consideration for the choice of metric and frequency of contact.

A more detailed review of the options and benefits of different approaches is available in our guide *'Putting CX Measurement and metrics under the spotlight'*

Set targets and monitor against benchmarks

Organisations frequently want to measure themselves against the competition, to assess what a good experience (score) looks like and what

Potential benchmarks can actually be wildly varied: no two organisations' structures, customers or promises are the same

they see as achievable. There is no doubt that in some instances benchmarks are very useful.

The most meaningful benchmarks are those where direct comparisons can be made. For CX, this means eliminating as many inconsistencies or biases as possible across methodologies, target audiences, and timing.

Decisions need to be made about whether to use external or internal benchmarks, or both.

External benchmarks

Understanding your strength within the market means benchmarking against competitors. Sometimes data is publicly available; for instance, many companies publish their NPS ™ results. However, you must ensure that you are comparing like with like. A more robust, but more expensive, option is to commission an anonymous market or competitor study that ensures all scores are collected in a consistent way without revealing the sponsor. The question here is, will it tell you how to improve? Probably not because you won't know how others have achieved their status, only that they are ahead or behind you.

Internal benchmarks

Internal benchmarking can be done in a few different ways. The latest round of CX findings can be measured against comparable historic survey results. Alternatively, the first wave of a new CX programme can be designated as the benchmark for future waves. Depending on the size of the business, it is possible to have benchmarks at an overall level and by business unit or department. However, even internally, it's not always a like for like comparison, so careful analysis of the underlying data is needed to avoid false conclusions.

A few questions to ask yourself:

- Are you comparing consistent methodologies?
- Do waves of data, or benchmark comparisons, have matched samples?
- Are you measuring the same things?
- Do certain time periods impact the results?
- Does the benchmark tell you what to do to improve or is it just a target?

Share and explain results consistently

When executives talk about the impact a CX programme has on their business, they focus mainly on the reporting and actions that are identified. However, to maximise the impact this will have, other elements must also be optimised.

One of the most challenging decisions, when embedding a continuous CX improvement programme into a business, is how best to cascade its results (and actions) to those who need to see them. There isn't a 'one-size-fits-all' approach. The most appropriate method, or methods, for sharing programme results will depend on a range of influences and factors.

A few questions to ask yourself:

PEOPLE

- Who will control dissemination of the results (e.g. agency, CX leads, self-serve)?
- Who needs to have access to the results?
- What detail do they need?
- Do they need to interact with, or analyse the results?
- Do they have appropriate skills to interpret?

ACTIONS

- How frequently/ when results are needed?
- What format of results will enable actions to be taken?
- What actions will be taken?
- How will they be prioritised for maximum ROI?
- Who will be accountable for the actions?
- How are actions followed up?

Mapping these considerations against the organisation as a whole, and the resources and the communication methods available to your organisation, will help you to maximise the distribution and consequently the understanding of the programme's results.

Assessing the impact of different CX reporting methods

There are a variety of tools to share and explain the results of your CX programme.

The choice of reporting methodology will be dependent upon many factors. The key differentiator however is the audience. Some staff need real-time information, others benefit from headline numbers, some need granular detail, others simply the actions they need to take. Organisations should weigh up the pros and cons of each method, match them to the audience and balance with resource and budget.

Interactive reporting

Online dashboards/reporting

Pros:
- Offers 'real-time' reporting
- Charts and graphics, trends, & verbatim answers, all filterable
- Hierarchical role-based access to the results
- Isolate touchpoints in the customer journey
- Easily distributed across the business, to monitor CX themselves for continuous improvement

Cons:
- Need careful design to ensure all information is available
- Staff need to be fully trained to avoid drawing inaccurate conclusions, prioritise the wrong things, or manipulate data to justify their viewpoints
- Hierarchies can be a challenge to manage
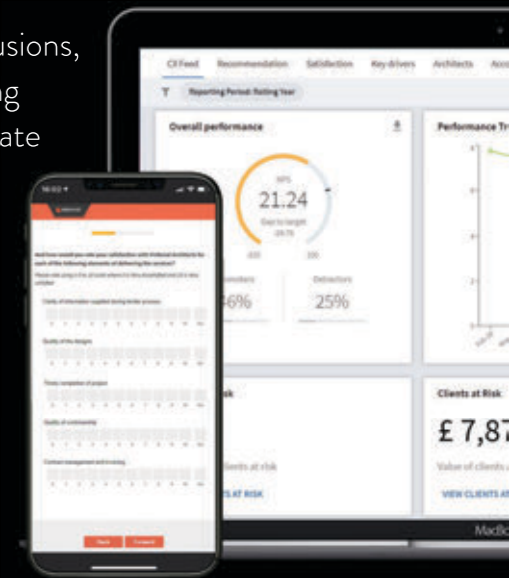
Sentiment & AI Text analytics

Pros:
- Real-time analysis and categorisation of verbatim comments
- Sentiment analysis to differentiate positive and negative elements Rapid analysis of high volumes of data
- Visualised highlights and pain points to help businesses understand the problem & uncover the root cause
- Constantly improving text algorithms
- Can be integrated with comments from social media, direct customer emails/ forms, call centre feedback

Cons:
- Requires some initial set up and management
- Not ideal where data volumes are low

Offline reporting

The more traditional forms of offline reporting have become less prevalent in many CX programmes, however they do form an important part of a CX team's reporting arsenal.

REPORT TYPE		IDEAL FOR...
Tabulated survey data, usually show results at the total level and by subgroup, may include significance testing.	DATA TABLES	Ideal for data gurus or analysts.
Simple dashboards, charts, created in Excel, may include some basic filters.	EXCEL-BASED REPORTS	Ideal if online reporting is not practical for a department or individual.
Full text export of answers given in response to open ended questions, usually shown alongside answers to pre-coded questions (e.g. NPS score), may include codes for verbatims, may include some basic filters.	VERBATIM REPORTS	Ideal if advanced text analytics not deployed.
Simple write up of key findings.	WRITTEN SUMMARIES	Ideal for summary explanations.
Graphical summary of key findings, using relevant imagery and icons.	INFOGRAPHICS	Ideal for wall posters and 'snap-shot' performance messaging to disseminate key metrics internally and externally.
Presentation style reports that are visually engaging and use the supporting data as evidence to tell a story to support, or rebuff, any hypothesis.	INSIGHT POWERPOINT 'STORYTELLING'	Ideal for senior audiences who want clear insight, advice, recommendation, and prioritised action.

A few questions to ask yourself:

- Do you need real-time results? How often? Are there any issues in having 'instantaneous' results?
- Are you confident results be interpreted correctly and consistently across the business?
- How will the CX team ensure that insights being drawn are the true priorities for action?
- Which messaging techniques will help you keep customer centricity and the CX programme top of mind across your organisation?
- Externally, how will you share what actions have been taken based on customer feedback ('you said, we did')?

Focus on prioritisation, action planning and follow through

A successful continuous CX improvement programme hinges on meaningful recommendations and action planning which can be strategic, tactical or both depending on the area being addressed.

There are several ways in which you can improve actionable impact.

Use statistical analysis to harness CX programme data

Maximise return on investment (ROI) in CX improvement by concentrating efforts on the areas that will have the most impact on customer experience. Analytical techniques can identify key drivers of customers' opinions, root causes of dissatisfaction, and map out and prioritise required actions. Evaluating the cost, difficulty, and time and effort for each one will lead to informed decisions about which actions to pursue.

Hold debrief workshops and planning sessions

An effective way of getting key parties together to agree CX improvement action plans, these sessions facilitate a common understanding of the current CX results, key drivers, root causes of dissatisfaction and priority areas. Past actions and any resulting impacts can be reviewed where relevant and new action plans set for the coming period.

Consider online action planning software

Some insight software solutions offer modules that enable a business to define and implement action plans, and then record their impact on customer experience over time. These tools allow a clear ROI to be demonstrated from the actions taken.

Incorporate closed loop feedback

Many CX programmes incorporate closed loop feedback (CLF) or customer issue resolution, creating important opportunities to understand and resolve issues first-hand - and retain customers at risk of leaving. CLF often uncovers problems hidden in aggregated survey data. Issues can be addressed in a targeted way, while broader themes will feed into overall CX improvement. CLF collects rich feedback, which augments action planning.

Assess the impact of your CX improvement programme

Creating, embedding and acting upon the results of a CX improvement programme is challenging but the final piece in the puzzle is understanding the impact of all that hard work.

- Externally, have customer views and behaviour changed?
- Internally, has the business culture evolved and processes improved?
- What effect is it having on the bottom line? What is the return on the investment?

Interrogate, repeat, compare and contrast

- If your business is tracking key measures, interrogate the data, moving beyond just looking at monthly trends. This might include in-depth qualitative research to dig deeper into customer and employee views.
- If your business is not already tracking CX measures on an ongoing basis, repeat the key elements of the initial research exercise regularly. This means speaking to your customers and employees at defined intervals to track the holistic view of your current CX maturity. Our guide 'CX maturity and the path to customer centricity' discusses this in more detail.
- Your CX results should be reviewed against available business data, such as revenue, average spend and employee retention. What patterns exist? Can statistical techniques uncover links between CX and business metrics? Many businesses find these two sources track very closely.

Adapt your strategy and programme in response to business or market changes

Even if everything is moving in the right direction, it's vital that your business doesn't assume that the last metrics against which you measured your CX maturity are still all the right ones and will continue to bring a positive impact. Key driver analysis, market analysis and wider consumer trends will help to uncover what might need to change.

Commit to rechecking your programme and your organisation's CX maturity on an ongoing basis, to optimise the impact it has on your business. Even if you score highly on all measures, you cannot afford to assume that the work is done. Change is inevitable and the best, most customer centric organisations know that they need to adapt to stay at the top of their game.

Regularly assessing and adapting your programme will increase its impact on your business and the ROI it delivers
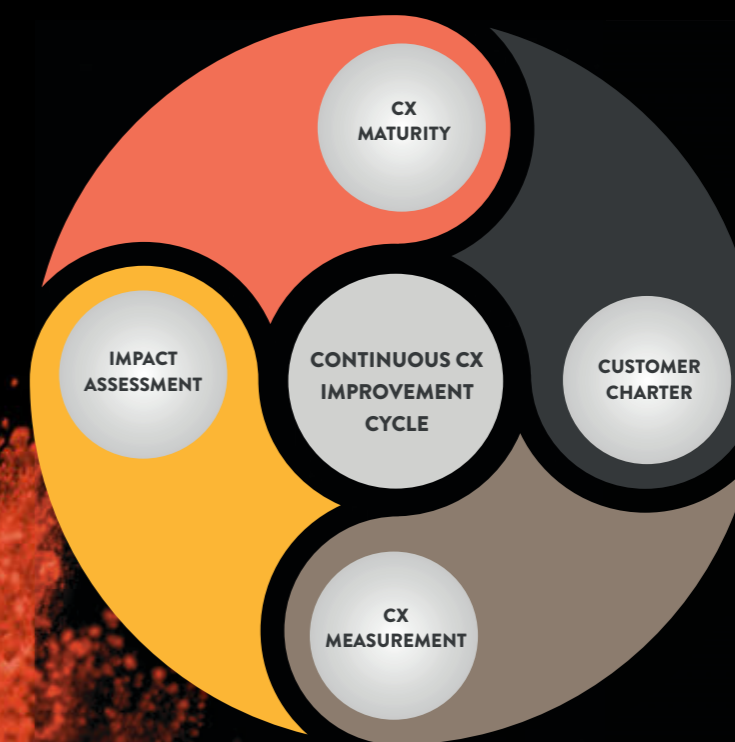
Beehive Research

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If you'd like to find out more about Beehive's approach to optimising the impact of your CX programme, contact us on:

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