



CX Mindset and Influencers Workshop

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Book Excerpt: Shaping
Processes and Technology

CHEP

A Brambles Company

Leading the Customer Experience

How to Chart a Course and Deliver Outstanding Results

Brad Cleveland



Shaping processes and technology

Several years ago, travel and lots of great restaurants were beginning to take a physical toll on me. I had always thought of myself as being just a “few years” out of college. It dawned on me that more than a few had slipped by, and I needed to make some changes. I decided to do a reset on my health. After some investigation, I booked a visit to Canyon Ranch in Tucson, Arizona.

I’ve since learned that Canyon Ranch is an iconic health resource, and now I know why. The Canyon Ranch team put me through my paces—tests and advice on diet, cardio, strength, flexibility, my outlook—the works. I had an appointment one afternoon with a physical trainer named Lorey. We shared stories about our families, then she put me through a stress test on a treadmill. As we went through the results, she summarized the verdict: Not bad. Not great.

“Why are you here, Brad?” Lorey asked.

“Oh, you know, lose a few pounds, get in shape,” I said.

“No, what’s the bigger reason?”

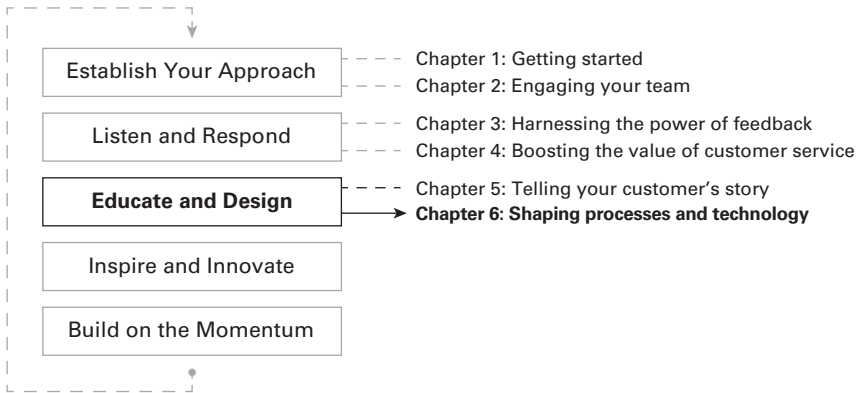
“I want to stay active and be healthy as I get older. Good answer?”

“I want to mention something, and I hope you don’t mind me telling you.”

“Sure.”

“My dad was your age when we lost him.” She glanced towards the window with a faraway look. “I was young then.” She continued softly and I strained to hear. “You know, every little girl wants a dad to walk her down the aisle.”

FIGURE 6.1 Leadership Framework, Chapter 6: Shaping processes and technology



As I struggled to choke back tears, I knew in that instant that my outlook was forever changed. I was embarrassed at how casual and self-focused my answers had been. But I was so grateful to Lorey for her boldness. I thought of others who had experienced great loss. That afternoon, I became a man on a mission.

My new vision was to be in good health so that I have a better chance of being around for my family (and yes, being active and healthy). So I can, perhaps, someday walk my daughter down the aisle. Lorey helped establish key indicators, such as heart rate, weight, body mass index (BMI), and a few others. I needed some new technology—the right shoes and a heart rate monitor. She helped me understand how often I need to exercise, the bpm my heart needs to reach when doing intervals, the distance (if running or biking) required for effective “steady state” exercise, and others. It’s all mapped out. While I don’t know the future, I know I’m a little wiser and on a far better track.

A pursuit of customer experience aligns in many ways with a journey to better health. You must have a vision that is strong enough, inspiring enough, to propel the work it takes. You need goals, KPIs, and supporting metrics. You’ll also need supporting processes and technology. We pick up with these topics here and in the chapters to follow. We’ll look first at building your dashboards. We then turn to processes, technology, and change management—all necessary to propel you towards your vision.

Build your dashboards

To effectively lead the customer experience, you and your team will need dashboards. This is a good place in your journey to establish them. My advice, first and foremost: be absolutely clear on your vision. NPS (net promoter score), CSAT (customer satisfaction) or other indicators are not the equivalent of vision (see Chapter 1). They are important KPIs, but exciting vision they are not. Like my epiphany on health, your vision will point to the KPIs that make sense. Those KPIs will, in turn, lead you to supporting metrics.

The disciplines of customer experience and employee experience wouldn't exist without access to large amounts of data. That includes, increasingly, the insights generated by artificial intelligence (AI) and machine learning technologies. You can understand more about your customers and your employees through their behaviors, their direct feedback, and the results of their actions, than ever before. But the sheer number of different customer experiences across many touchpoints can lead even the most tenacious CX professionals to throw their hands up, wondering how to measure it all. Your dashboards will help you cut through clutter and tell a unified customer story.

Layered view

You'll most likely need department- and role-specific iterations of your dashboards. From a functional perspective, the marketing team will want to see customer experience in the context of response rates, conversions, and revenue. The digital team will need a view of page traffic and engagement. The contact center will need an eye on service levels, time to resolution and post-contact survey results. Senior leaders are interested in customer perceptions and outcome-related metrics, such as customer loyalty, repurchase rates, and customer lifetime value.

Dashboards are helpful when arranged in a three-layer cascade of detail:

The macro or strategic view: This view combines business (revenue, sales, market penetration), customer experience (customer satisfaction, net promoter score, customer effort score, customer churn or loyalty metrics), and employee experience (employee satisfaction, turnover). It should provide the ability to view data by product, department, or customer segment. This high-level view allows senior-level leaders to keep an eye on overall direction and to check in with managers on specific trends.

Example: Your core CX team reviews last month's survey feedback on their macro view dashboard. They see CSAT is down noticeably for new customers. They notice that it's a trend that has been building since the last product release. There have been problems in the past with products launching before they were ready or with delayed documentation. It's a bit of a sore subject. The team asks the VP of Product to take a look.

The mid or functional view: This view allows managers, analysts, and roles such as marketing, stores, and the contact center, to dive more deeply into relevant data. This enables them to connect the dots between their areas of responsibility and overall strategy.

The VP of Product sighs. She pulls up her dashboard, which also gives her access to voice of the customer (VoC) streams (complaints, escalations, post-call and NPS surveys). She then pulls up the post-call survey data and digs in. What she finds is interesting. When she drills into categorized results, she can see that more complaints were categorized as "feature-complaint." This is how the team categorizes feedback related to features that work as designed but that the customer doesn't like or doesn't understand. The reps in the contact center can help explain it—but by then it's already disrupted the customer's business. So, there's still dissatisfaction.

The micro or tactical view: This view is for specialized roles such as website managers, digital marketers, store or contact center supervisors, and product managers. It provides data down to the individual customer level.

The VP asks a voice of the customer (VoC) analyst to listen to a sample of poorly rated calls and document what he hears. The analyst goes to his VoC dashboard to filter for poorly rated calls tagged "feature-complaint." He also heads around the corner to the contact center, and checks with some reps. "What are you hearing about the last release?" After listening to calls and talking to reps, the analyst feels confident he found the gap. Many cloud customers were using the new release before the documentation was published. This created misunderstandings about the new features, especially with customers not yet familiar with the product. When the analyst validates this perspective with a team of reps, they emphatically agree. Communication for this release was late and lacking in critical detail.

The VP of Product presents these findings to the CX team, with a plan to improve future customers' experience. No product releases will be launched without complete documentation published several days ahead. Frontline

FIGURE 6.2 Dashboard layers



reps will review the documentation ahead of the release to anticipate customers' (especially new customers') questions or concerns.

You get the gist here. This is one of a jillion ways to use a multi-layered, consolidated CX dashboard. And I'd point out the wise decision of the analyst to walk around the corner (or call or video conference) and have conversations with those closest to the issue. Dashboards are important tools. They don't replace firsthand experience, wisdom and intuition.

In terms of the dashboard itself, you can build or buy. You'll consider the expertise within your organization, budget, your organization's size, existing tools, and the scope of your customer experience initiatives. Some buy products and services à la carte and build their own dashboards. The preferred path for many is to buy a tool (cloud solutions and open platforms have made this much easier than it used to be). Also, be sure to thoroughly investigate tools that are already in use in your organization; there is likely something there to tap! Given the abundance of considerations, it's common to bring in outside help to inventory options and integrate the pieces into an overall approach. My advice: when it comes to building effective dashboards, do what it takes to get it right—don't skimp.

Design processes that support customer experience

I often hear executives comment that they wish their organizations had Amazon.com’s technology capabilities. What they are really longing for is Amazon’s processes. I believe it’s safe to say that there are few technology capabilities Amazon has that others don’t also have access to. In fact, Amazon builds tools for its own operation, then makes them available as products others can use (including even the smallest organizations). You can have Amazon’s technology—but that’s not enough!

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The technology others have access to is available to you, and you can build powerful processes that make the most of it. But processes are something you have to earn. While Amazon was taking losses year after year, investing in better ways to do things, other organizations focused on the next quarter. The good news is, if you want to deliver better customer experiences, you can do so. There’s no magician behind a curtain in any organization. It’s a matter of resolve and focus.

Let’s look first, generally, at why processes are such a big deal. Broadly speaking, customer experience management is part of the organization, an expansive process that includes many functions. More specifically, each part of customer experience management is a process. For example, an interaction during a sale or when a customer needs support is a process. In fact, any part of an interaction—say entering data—is a process. It involves a data system, a person or bot, and a set of actions. Now, consider any aspect of customer experience management you want to improve—let’s say handling an order correctly—to meet expectations and avoid rework. Each of these variables has an impact. All are interrelated.

Thinking of processes this way highlights a principle that has long been at the heart of the quality movement: there is little use exhorting employees to improve customer experiences without making improvements to the processes they are part of. Through better processes, your organization will be equipped to deliver experiences that are consistent, effective and sustainable.

CX processes are cross-functional

A colleague of mine recently visited the contact center for a well-known health insurance company. While she was meeting with team members, she saw job aids referring to “building empathy” and delivering “apologies with heart.” The quality assurance (QA) form measured employees on how well they helped customers manage their intense emotions over delayed claims. The training content emphasized how to explain complicated claims processes. When she met with the contact center director, she asked, “Why so much time and energy on training reps to manage customers who are disappointed... by you? Why not just fix the claim issue?”

He sighed. “It’s not that easy. The claims department have their way of doing things. We’ve tried to meet with them over this issue a few times, but the message is clear—‘stay on your side of the fence.’ We do our best, but customers express frustration every day. We can’t magically make customers okay with it.”

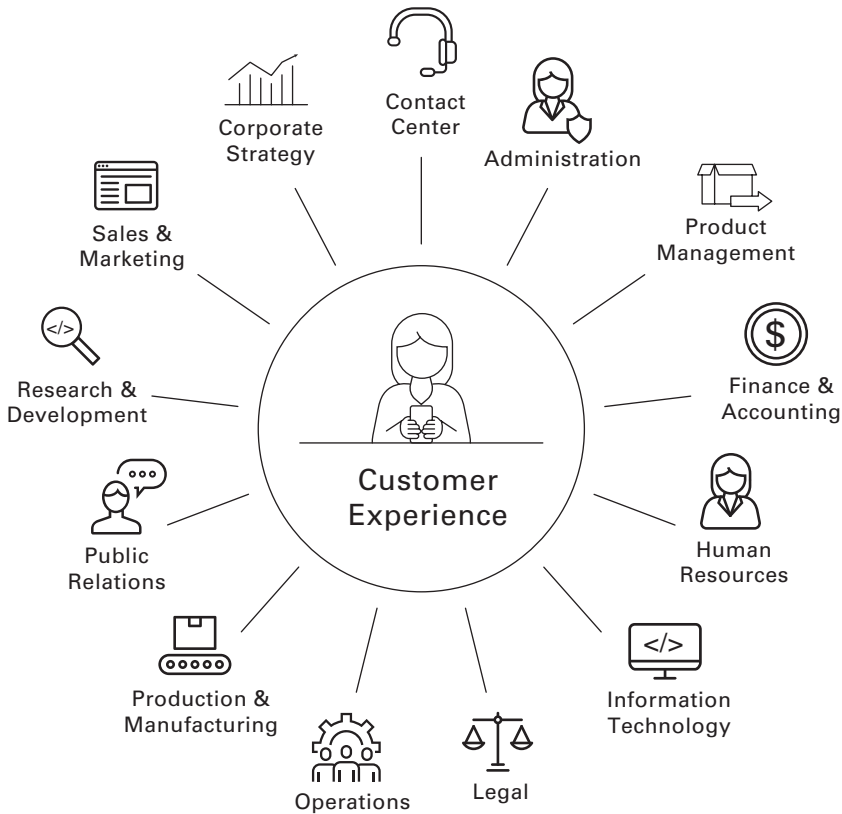
This scenario—and I suspect you may have similar stories—is all too familiar in some organizations. In fact, according to PwC research, only 49 percent of consumers say companies they interact with provide a good customer experience.¹ Too often, there is a gap between what customers want and what is being delivered.

Customer-centric organizations spend proportionally more time designing processes and proportionally less time getting better at appeasing unhappy customers. They devote their attention to eliminating what makes customers unhappy in the first place. Of course, glitches will still happen, and the processes you use to resolve those issues are essential. Effective complaint resolution will always be part of your CX portfolio. But that shouldn’t be the main focus.

The challenge? Without deliberate intervention, departments don’t naturally work across functional lines. The marketing team focuses on messaging and response rates. The product management team is occupied with product design and development. Billing concentrates on revenue and collections, and the contact center on meeting service levels and creating positive customer interactions. Each team fixates on being the best they can be within the boundaries of their department.

This includes areas whose managers may not fully grasp the overall impact on customer experience. The legal department requires necessary “legalese” in customer documents. The compliance area demands stringent

FIGURE 6.3 Customer experience functions/processes



verification to protect customers and the organization. Every department can agree that designing processes and technology with the customer in mind makes sense. Even so, being customer-focused within a silo doesn't fix the most exasperating barriers to good experiences.

Great experiences happen by design through cross-department collaboration. They are shaped with a clear-eyed view of the customer as they traverse through the work done by marketing, product management, billing, and the contact center. That work must be coordinated and seamless for the trip to feel effortless, satisfying, and yes, sometimes even WOW. And to create that collaboration, your organization must have high-level sponsorship. Senior leaders must define a common vision and goals, and hold all accountable to pursue them (see the section "Define and communicate your vision and goals," Chapter 1).

Finding gaps and identifying priorities

The processes that impact your customers run through your organization like veins. This makes it challenging to prioritize the changes most likely to move the needle on your CX and business objectives. Let's use a healthcare insurance provider as an example.

Marketing sends direct mail pieces targeted at the desired customer, providing them with the website address (digital team) and a phone number (contact center). "Simple. Quick. Hassle-Free." That's what is promised. As teams map the journey from awareness (seeing an ad), to education (reading about it online), to enrollment (digital or contact center), they realize that while simple, quick, and hassle-free might describe the process once the application is accepted, it doesn't describe the "complete the application" step.

The application requires customers to provide their social security number, marital status, proof of prior coverage (where do you get that?), dependents and their social security numbers, past medical records, past and present prescription medications, and more. The web prevents customers from proceeding without complete entries and it does not save their information if they pause for too long mid-process. It becomes clear that "Simple. Quick. Hassle-Free" was what the marketing department *wanted* the customer to feel. However, the rest of the organization hasn't coordinated across departments—digital, user experience, contact center, legal—to deliver on this promise.

Once you start examining the customer journey in detail, it's easy to become overwhelmed by gaps to close. A simple way to prioritize opportunities is to first consider goal alignment and customer impact. Using the insurance provider as an example, if your primary goals are acquisition and revenue, resolving those gaps would lead to one set of priorities. Retaining existing customers would lead to another. Second, are there indications in customer feedback that completing the application is a customer pain point? If yes, then closing that gap is a priority. If there are higher customer pain points that align with "increase acquisition," that factors into your prioritization matrix.

Don't be overly alarmed at the gaps you may find when you start mapping customer journeys (discussed in Chapter 5). That is the point of mapping. It's why effective leadership is so important. This is a time to

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leave egos and turf wars at the door. It’s also why involving frontline employees is crucial. Employees know your processes. They are aware of any gaps between what’s promised and what’s being delivered. And they understand the level of urgency and emotion around different customer pain points.

Leverage the potential of technology

With a clear vision and sound processes, the right technology solutions tend to come into focus. As you look at ways to harness technology, some improvements will be incremental—small wins here and there—and others will be more sweeping. In some cases, you might even use technology to create new markets.

Automating existing processes

Here’s an example of using technology to automate an existing process. Prior to the pandemic, things were humming along nicely for an IT company. One of their primary ongoing responsibilities was to support their clients—organizations using their IT services. They were staffed at the right levels and delivering on all goals. Clients and employees were happy. Covid-19 changed that overnight. When the crisis hit, a far greater number of their clients’ employees were working from home and contacting the IT company directly (previously, they would start with their in-house IT resources who could provide basic support).

“We were going crazy under an avalanche of entry-level questions,” shared the department manager. “My engineers were spending their days walking people through basic resolutions, such as how to reboot a router. We want to provide great support, but that’s an expensive call for a router reboot!” He added, “If we followed the processes as they were written, we

would tell callers, ‘You need to call your IT department first.’ But that’s not a great experience for those individuals. They needed help. So, we spent time with clients and adjusted the process. Their IT departments were overwhelmed, so we decided to take on those entry-level questions since they were coming to us anyway.”

The solution?

Since we were already using an automated system to start new tickets, bots were a logical approach. We didn’t want customers to feel like we were deflecting their issues—even though it would have been allowed by the terms of our contracts. Continuing to provide timely, responsive service was important to us. Bots allowed us to create a new ticketing process, where if a customer selected four of the most common entry-level ticket types, a chatbot would walk the caller through simple troubleshooting steps. If the issue was resolved, the bot would close out the ticket. If the customer needed further assistance, a ticket would be opened with a record of the attempted troubleshooting and a description of the issue.

During the pilot, they had a user experience (UX) designer observe users and ask questions afterward. Our clients were 100 percent on board and are happy with the support this technology provides their IT teams and their frontline users. So much so, in fact, that their IT teams are considering implementing similar technology.

Designing the ideal customer processes should always—*always*—come before technology. In the example, the IT company started with a clear description of the desired experience: maintain high levels of service while reserving core team members for contacts that require expertise. When Covid-19 hit, they considered adding less-skilled team members to handle the contacts, but they decided the preference was for a more automated, scalable approach. The solution was successful on many levels; it provided a cost-effective way to meet customer needs and deepen connections with clients.

“*The market is awash in technology solutions. If anything, it’s crowded, confusing, and maybe a little overenthusiastic.*”

The market is awash with technology solutions. If anything, it's crowded, confusing, and maybe a little overenthusiastic. Almost two-thirds of mature CX-driven companies still rely in part on “old school” methods, such as “talking directly to their customers, having the best talent on board, and doing market research,” and “are less likely to seek out ‘over-hyped’ methods such as chatbots, predictive analytics, and augmented reality.” More mature companies “don't get distracted by ‘shiny’ objects and stay focused on what they know will deliver results.”²

“*Most companies known for delivering exceptional customer journeys do push the boundaries of technology to drive improved or different experiences. But they do so with a clear-eyed understanding of what they want those experiences to be.*”

Creating new processes

When automated teller machines (ATMs) were just beginning to appear, I was still very young. But I remember a neighbor commenting to my father, “No way would I trust a machine to give me the correct count. What if it's wrong? They'll think I pocketed the difference!” Some years later, I was the one pushing back. I enjoyed collecting CDs and resisted early efforts to purchase music in a digital-only format. No artwork? No liner notes? What would I put in my CD rack? (I've since changed my... um, tune on this.)

In standard CX and continuous improvement practices, you look for never-ending improvements on existing processes. Gap identified and closed, customer satisfied, journey saved. *Voilà*, all good. There are times, however, when it makes sense to look over the horizon and go big. Capitalize on the potential of new technologies to support entirely new experiences. Innovative companies—Apple, Netflix, Amazon, Tesla, Helly Hansen, and others—have done that by pushing the boundaries of emerging technology. They became astronomically successful by looking beyond what customers said they wanted (smaller phones, thicker insulation). They instead created distinctive markets.

Most companies known for delivering exceptional customer journeys do push the boundaries of technology to drive improved or different experiences.

But they do so with a clear-eyed vision of what they want those experiences to be. Eyewear retailer Warby Parker (introduced in Chapter 1) made their name with the in-home try-on experience; they then launched an app that leverages augmented reality (AR) to provide a realistic digital try-on experience.

Norwegian firm Helly Hansen, 145-year-old maker of ocean and ski gear, sees technology-driven customer experience as the path to the future. In an example, the company collaborated with a community of outdoor professionals to develop light, high-tech materials that store warmth regulated through ventilation zippers. They also recently became part of Toronto-based CTC, which kept HH headquarters in Norway and promised to allow their unique culture to continue—while bringing them into a global distribution and service network.³

Is it a contradiction to offer predictable, frictionless experiences—but also look to implement disruptive boundary-pushing experiences? No. But it does take leadership and good judgment. The alternative is to provide incrementally better experiences while staying in place. This leaves you vulnerable to competitors who are capitalizing on experiences AND innovation. To be successful, you likely need both.

There are two scenarios in which it makes sense to let technology drive customer-facing processes. The first is when you believe you can transform an existing process. Before speech recognition technologies, organizations were limited to touch-tone. You could make incremental improvements to phone menus, but it was still a pretty horrid experience. Relief arrived with conversation-based systems. Now customers can simply tell the system what they want. That, in turn, opens up a world of new opportunities. Once I tell the IVR I'm calling for "printer technical support," it can identify me by my phone number, verify my printer model and warranty information, ask me about the nature of my problem, and route my call to a support representative while presenting that I am already verified and qualified. Add in additional context for the rep—my customer history and custom troubleshooting steps—and imagine my perception of the organization when the rep says, "I can see you called about this issue yesterday. Were you able to install the upgrade you and Tom discussed? How did that work out?"

Services Australia, the service arm of the government, has made a successful push for customer authentication through voice biometrics. Automating the process reduces the time it takes to handle interactions. More importantly, it opens up many new opportunities. If the system knows who the customer is, it can deliver relevant information: "You can expect payment by 20 April."

Should additional assistance be needed, the system can deliver the customer's history to a service officer.

A second scenario in which it's appropriate to let the technology drive the process is to facilitate entirely new experiences. In the past, buying a used car was something many consumers dreaded. Along comes Carvana, an online-only used car retailer that has completely reimaged the process. As a customer, you begin by searching for cars that fit your needs and budget. If you click on a car, you get more details. Each detail page provides a photo gallery, a detailed report on the car's condition, and a guarantee that the car has not experienced an accident, fire, frame or flood damage. Click into delivery and pickup options, and you'll see how soon the car can be delivered. Selecting "Get Started" will initiate the buying process. When the car is delivered, you can take it for a test drive and then either send it back or complete the paperwork so it's yours.

Should Carvana rest on its laurels, there are other options. Shift, for example, will come to you, inspect your vehicle and make an offer on the spot. If you accept, they take the car, and the purchase price hits your account later that day. Shift COO Sean Foy, formerly of Amazon, said, "We don't want this to be a technology-heavy process for the buyer; we want to stay as frictionless as possible so that we can attract more and more people onto the site... it's really about removing friction from the product."⁴ Foy alludes to the primary rule for leading with technology—it should be invisible to the customer, perform flawlessly, and enable seamless experiences. There's no formula or ratio that determines the right mix of incremental improvement and disruptive leaps. That requires leadership.

Important lessons

As you look for ways to leverage technology—whether incremental or disruptive—here are some important lessons:

Avoid applying technology solutions to broken processes. If customers complain they don't receive follow-up as promised, the most elegant fix may be to eliminate the need for follow-up. Empower employees to make the critical decision on the spot (perhaps with AI-enabled decision-making tools). Let go of or reshape processes that are cumbersome or broken.

Make sure your solutions work in the real world. You'll want to test that you're solving the right problems and not creating new ones. For example, you might find (as one organization did) that the new web application works great, but that some features aren't available in Safari. If Safari is the

preferred browser of Apple-evangelist customers, you might rethink rollout. In another example, the data you require your privacy-conscious customers to share to use the app makes them nervous. So much so that they're posting on Reddit today—a warning that's going viral. (These were both real-life examples of technology solutions that failed to hit the mark. The reason? Experience designers—developers, product managers, user experience designers—didn't anticipate the barriers.)

Coordinate with and incorporate digital transformation efforts. Many organizations have “digital transformation” initiatives underway. (Digital transformation broadly refers to harnessing digital technologies to improve efficiencies and create new or better experiences for customers and employees.) These efforts are not always coordinated with or part of customer experience initiatives. Ideally, digital transformation should be part of—a subset of—customer experience management. At the least, ensure that digital transformation and customer experience aren't on two different and uncoordinated tracks.

Don't fall for promises of magic. Millions of dollars are wasted each year on technologies that are never delivered, never implemented, sit idle, or (most commonly) simply fail to deliver promised results. While CX technology spending continues to break records, many organizations still struggle to provide satisfying experiences to their customers. Prioritize technology that supports your customer experience vision and goals. Pursue technologies that help you get closer to your customers, and to deliver experiences that are effective and simple.

Establish essential customer experience tools

Let's turn to a specific category of technology—the tools you'll use to manage customer experience. We'll first review the most critical CX technologies, those that are foundational to your CX initiatives. We'll then look at some “nice-to-have” capabilities.

Must-haves

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) PLATFORM

I'm always amazed at the impact (both positive and negative) that customer relationship management (CRM) technologies can have. When there are multiple and disparate CRM systems, or when CRM capabilities are not

properly maintained, the result can be a management and usability nightmare. But when the organization is united under one strong, well-curated CRM across marketing, sales and service functions, the tool becomes the lifeblood of day-to-day operations.

A key theme in CX is personalization—delivering unique experiences for specific customers that align with their characteristics. Your ability to capture customer profiles and preferences, history and status, and create appropriate experiences is dependent upon strong CRM capabilities.

Another fundamental benefit of CRM is to create a “one company” feel for the customer. “Omnichannel” capabilities are crucial in today’s environment. There are few things more frustrating than trying to deal with an organization where departments operate like independent businesses, or where communication channels are disjointed. Lack of continuity and consistency will seriously diminish customer loyalty. A well-maintained CRM platform brings transparency to all customer interactions. It enables employees and systems to operate with a full picture and intelligently handle things that extend outside of their immediate purview.

KNOWLEDGE MANAGEMENT

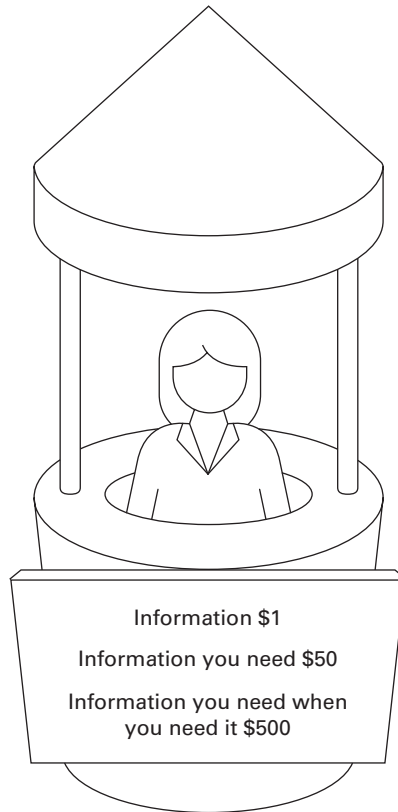
Knowledge is the lifeblood of most organizations. And the theme of effort reduction is one of the most established tenets driving CX initiatives. Your ability to resolve issues quickly and easily almost always depends on real-time access to accurate information.

Enter knowledge management (KM). KM overlaps with CX both directly and indirectly. The direct overlap is in the areas of self-service and customer communication. With strong KM processes and a good tool in place, many issues that would have generated a support interaction can now be resolved by customers. Not only is this a better experience, it’s also become an expectation. Customers don’t want to have to reach out for information that should be immediately accessible through an app or website.

The indirect overlap involves employees’ ability to access data. To facilitate a timely resolution for customers, employees need a reliable and immediate source of information. I still find cases where employees can’t find basic information easily or without assistance. Organizations that focus on great customer experiences invariably also make knowledge management a priority.

There are some general paths to knowledge management you can take, though the distinction between them is blurry and fading. One is best-of-breed KM solutions, which are feature-rich and can be integrated with CRM

FIGURE 6.4 The value of information



systems. Alternatively, KM features are inherently part of many CRM packages, but tend to have fewer features. Either could include both employee- and customer-facing capabilities. There are also many home-grown approaches (portals, collaboration platforms, and others). This remains a common approach, but is usually not as effective as KM capabilities that are integrated with or part of CRM systems.

Whatever the technology, your underlying processes are critical. When well-organized, well-curated, and universally accessible, the right information will have a powerful and positive impact on both the customer and the employee experience.

SOCIAL MEDIA MANAGEMENT PLATFORM

Engaging with customers through social media channels is a tangible example of how customer experience management is cross-functional. Marketing

will often choose a tool, handle marketing-oriented messaging, and may handle some of the interactions with customers. But fielding the breadth and volume of customer interactions often requires more horsepower. Many organizations wisely equip their contact center or a team within customer service to help.

A social media management platform is critical. It should provide insight into how the brand is being represented and how customer sentiment is evolving; these insights will help highlight opportunities, gaps and priorities. To facilitate more effective engagement and service, it should also be integrated with your CRM and omnichannel routing tools.

Beyond the basics

The following are capabilities that I put in the category of “nice to have.” You might view them as essential to your business, and I’d certainly support your intuition. Ultimately, the priority you assign to them is a matter of judgment.

CUSTOMER EXPERIENCE MANAGEMENT PLATFORM

Customer experience management (CXM) platforms are emerging, and not yet widespread. Those who do have CXM technology find that it becomes the heart of their voice of the customer program. My advice: if you don’t yet have CXM, don’t obsess about it, but do include it on your roadmap as you develop CX plans.

A capable CXM platform funnels all voice of the customer data into one system and, typically, uses AI and machine learning to organize, tag, show trends, establish scores, generate dashboards, illustrate return on investment (ROI), and even provide suggestions on next steps for CX improvement. With analytics capabilities, it can establish a customer sentiment score. Even a small organization can gain tremendous value from a neutral, automated approach available through CXM.

Many CXM platforms are also capable of facilitating “closed loop” processes based on triggers you configure. For example, when you receive a customer effort score of lower than 4 out of 7, you may want a supervisor to review the ticket and reach out to the customer. This can easily be set up to enable the communication to happen in real time within the right team—and with no effort from the core CX team.

CXM platforms are still fairly new, and improved functionality is emerging almost daily. Communities that track developments, such as CX Accelerator (www.CXAccelerator.com), are a good place to begin your research. While it

may be possible to get by without a CXM platform, I don't advise doing so forever. Even small organizations can reap the benefits.

VOICE OF THE EMPLOYEE PULSE SURVEY TOOL

As discussed in Chapter 2, capturing the voice of your employees (VoE) is as important as your VoC program. A pulse survey tool enables employees to take a quick, mobile-optimized survey. They are easy to administer and are easy for employees to respond to; they can be used with some frequency (e.g., weekly if things are changing). They can enable anonymous text feedback, facilitate recognizing a coworker, and provide other goodies—all through a mobile app.

For customer experience leaders, this data is vital. When you want to understand why a customer experience problem exists, the first place to look will often be employee experience data. Chances are, once you resolve a hurdle for your employees, you'll also be resolving it for customers.

USER COMMUNITY PLATFORM

Customers can quickly develop a special affinity for a brand or product, and many will want to connect with others like them. “User communities” that bring customers together are becoming very popular. They aren't a fit for every organization, and you'll want to consider what might work for yours.

One option for building or facilitating a user community is to use existing social platforms—e.g., Facebook or LinkedIn. For example, Ecamm is a sophisticated software package that enables Mac users to control live streaming—ideal for vloggers, professors, and others who present remotely. It's a niche product that rapidly took off in 2020; users by the thousands gravitate to a simple Facebook site to ask questions and swap experiences.⁵

The other option is to use a tool to build your own community platform. As mentioned in Chapter 4, Intuit, maker of financial and tax software, has developed a robust community of users accessible directly from their software interface. If you want to know whether that new set of tires on your John Deere tractor should be expensed or amortized—someone in the community will know. Forums are moderated by Intuit employees, and content on the platform is archived and searchable. One fun feature is that users who post and reply are recognized by rankings—provide an answer that becomes an “accepted solution” and you'll be tagged as one of the elite.⁶

Excel in managing change and improvements

Customer experience transformation is characterized by continuous improvement and change. However, as a discipline, CX isn't defined by a single methodology that guides all activities. Far from it. Talk to 10 experienced practitioners and each will share their own secret sauce—often with great conviction. (Tools and methods are CX geeks' equivalent of politics—don't be surprised by passionate debates.)

So let's simplify this discussion. There are three main categories of activities you'll need to address. (My goal is not to cover methodologies in detail, but to offer recommendations on how to approach this whole area from a leadership perspective.) The three areas are:

Change management. Customer experience initiatives involve guiding the organization through complex and never-ending change. Change management is largely focused on the people aspects of change. It centers around ensuring that employees understand, embrace and successfully adapt to changes. Prosci's ADKAR® Model and John Kotter's Leading Change Model are common approaches. And governance, which we cover in Chapter 8, is an important part of change management. Change management is distinct from and overarching to process improvement and project management.

Change management has always suffered from an identity crisis. IT professionals talk about change management in terms of rolling out new versions of software. Here, we're referring to the people side of change management. Both are necessary and should not be equated.

Process improvement. Your team will need effective methods to guide ongoing diagnosis and improvements to processes. In any CX initiative, process improvements are plentiful, diverse and ongoing. Examples include the ongoing adjustments and improvements to apps, websites, communication, forecasts, quality standards, reporting, knowledge management, and many others.

Bring on the alphabet soup—Lean, DMAIC, Six Sigma, Kaizen and others. Many tools that have been around for years remain indispensable: flow charts, cause and effect diagrams, statistical control charts and others. There's no need to reinvent the wheel. The key as leader is to ensure your team uses a methodology and tools that get things done. As your CX initiatives grow, your process improvement toolkit will expand. It's helpful for CX practitioners to be adaptable—your team is working across functions and often within activities that are already underway.

Project management. Your team will need an approach that keeps projects on track and within budget. Typical examples of CX projects include

evaluating and implementing new technology, significant redesign of a cross-functional process, or creating a new CX-oriented workshop curriculum. In many organizations, larger projects are managed by dedicated project managers.

It is helpful to adopt a go-to approach for managing projects. Examples include Project Management Institute® standards and JPACE. The rigor in these methodologies can boost project success and reduce confusion and uncertainty. The one caveat is that one size does not fit all—you'll need to find a balance between too little and too much project management. There's managing and there's doing, and you'll want the right amount of both.

Recommendations

Here are some recommendations that relate to all three areas (change management, process improvement and project management):

- First, ensure your team uses methods that are appropriate to the task at hand. You may want to carve out time to get briefed by your team on the methods being considered. Get their help in making a good call.
- Find a balance between A) allowing anyone in any area to use any tool, and B) mandating a specific approach. A middle ground with a sensible mix of tools is where most land.
- Look for opportunities to develop expertise within your organization. You'll likely have individuals who have the golden combo—they are experienced with tools, understand projects and processes, and are good with people. Hang on to them! Get their help to deepen know-how across teams and activities.
- Different approaches often take root in different areas, and that's not necessarily a bad thing. Some tools are better suited to some activities (e.g., software development teams often use DevOps or agile). My encouragement is to be intentional when deciding if and where to allow different approaches.
- The proof is in the eating of the pudding. Hang on to methods that work, and make adjustments in those areas that chronically get stuck or go off track.

The overall message here is to not to reinvent the wheel. If you have a team of certified project managers, use them. If your organization has previously adopted lean methodologies, take advantage of that experience. When employees struggle to keep up with changes, settling on and using familiar

tools can save time, boost confidence, and reserve mind-share for customer-focused work. And remember Nike's slogan ("Just do it!"); time spent ruminating over models is time you're not spending getting closer to your customers.

KEY RECOMMENDATIONS

- Build your dashboards.
- Design processes that support customer experience.
- Leverage the potential of technology.
- Establish essential customer experience tools.
- Excel in managing change and improvements.

Notes

- 1 PwC (2018) Experience is everything: here's how to get it right, www.pwc.com/us/en/advisory-services/publications/consumer-intelligence-series/pwc-consumer-intelligence-series-customer-experience.pdf (archived at <https://perma.cc/M7NA-WATM>)
- 2 Hotjar (2020) Customer Experience Trends and Stats, www.hotjar.com/customer-experience/trends-and-stats/ (archived at <https://perma.cc/9XNY-G757>)
- 3 European Business (2017) 140 Years of Innovation: Interview with Paul Stoneham, CEO at Helly Hansen, *European Business*, www.european-business.com/interviews/helly-hansen-as/140-years-of-innovation (archived at <https://perma.cc/5KUK-V3AU>)
- 4 Korosec, K (2019) Online used car startup Shift adds another \$40M, snags COO in road to IPO, *TechCrunch*, 10 April, <https://techcrunch.com/2019/04/10/online-used-car-startup-shift-adds-another-40m-snags-coo-in-road-to-ipo/> (archived at <https://perma.cc/SKE8-ZAHQ>)
- 5 Ecamm Live Community, Facebook
- 6 Nullar, L (2019) Community Rank Structure, *Intuit QuickBooks*, 30 November, <https://quickbooks.intuit.com/learn-support/en-us/community-basics/community-rank-structure/00/421738> (archived at <https://perma.cc/YE4N-ZL86>)