



# **CX Mindset and Influencers Workshop**

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Book Excerpt: Define  
and Communicate Your  
Vision and Goals

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# Leading the Customer Experience

*How to Chart a Course and Deliver Outstanding Results*

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## Define and communicate your vision and goals

I recall sitting at the back of a conference room as an organization launched its customer experience initiative. Two presenters who were helping to drive the initiative presented a 75-minute overview. They covered, in 30 to 40 slides, the highpoints of plans. They used acronyms such as CX, NPS, and CSAT. They discussed surveys and response rates. They showed charts and graphs. And more charts and more graphs.

After the presentation wrapped up, attendees began filing out of the room. Being in the back, I was first out the door. Two people behind me were heading for a coffee station. “Did you get all of that?” one asked the other. “Not much,” was the reply, “And we’re up to our eyeballs in work; I hope this doesn’t add much...” The conversation trailed away as they headed in the other direction.

“*The right metrics are important, for sure. But vision they aren’t. Metrics don’t win hearts and loyalties.*”

Can you picture Richard Branson dreaming of a high NPS (net promoter score) when launching the Virgin Group? Did you ever hear Elon Musk touting CES (customer effort score) as the motivation behind new products? Or Mother Teresa discussing her work in terms of CSAT (customer satisfaction)? The right metrics are important, for sure. But vision they aren’t. Metrics don’t win hearts and loyalties.

### *Create a specific, compelling vision*

A clear vision, well communicated and continually reinforced by you, is essential to engaging your employees, aligning objectives, and driving action. Vision can take many forms, including a vision statement, a mission statement, a set of values, or some overarching principles or standards. Don’t worry about a specific formula or label for your vision.

I have colleagues who are huge fans of eyewear retailer Warby Parker (caution: CX reports take a toll on eyes). Warby Parker is renowned for exceptional customer experience design. Their mission is simple and compelling: “We believe that buying glasses should be easy and fun. It should leave you happy and good-looking, with money in your pocket.”<sup>7</sup>

One coworker describes her recent experience this way:

When I arrive, there's no wait (easy) for a friendly sales advisor to provide expert recommendations (good-looking, happy). I'm not ready to buy yet, but my advisor informs me my favorites will be emailed to me, along with a virtual try-on app, in case I want to "try on" any more styles without coming to the store (easy). The app will even make suggestions (good-looking)! I stroll through the mall to a competitor and I'm thrilled with the price difference (money in your pocket). Maybe I'll buy two pairs—one for business, and one for weekends (fun)!

Here are some other examples of vision. USAA, the highly rated insurance and financial company, operates around four core values (summarized in just four words): Service. Loyalty. Honesty. Integrity.<sup>8</sup> Together, they are simple, clear and inspiring. And they pack a punch because at USAA they discuss and include them in any decision. That makes a real difference.

REI is a provider of outdoor equipment and services, and I love their mission, which also serves as their vision for customer experience: "We inspire, educate and outfit for a lifetime of outdoor adventure and stewardship."<sup>9</sup> As you might imagine, that gives their newest employees a good sense of what to do (and the inspiration to do it!).

And it's not just private companies having all the fun. Services Australia, the service arm of the federal government, is simplifying and improving services around this vision: "Make government services simple so people can get on with their lives."<sup>10</sup> It's a bold, ongoing initiative that is already showing strong results. I'm also seeing Service BC (British Columbia, Canada), the US Department of Veterans Affairs, and others within government strongly focus on shaping experiences that meet the evolving needs of their communities.

## EXAMPLES OF VISION, MISSION, VALUES

### **Warby Parker mission**

"We believe that buying glasses should be easy and fun. It should leave you happy and good-looking, with money in your pocket."

### **USAA core values**

"Service, Loyalty, Honesty, Integrity."

### **REI core purpose**

"We inspire, educate and outfit for a lifetime of outdoor adventure and stewardship."

### **Services Australia vision**

"Make government services simple so people can get on with their lives."

How does Warby Parker, USAA, REI, Australia, or any successful organization know the experiences their customers want? They listen to and strive to understand them. They observe their behavior. And they build that insight into their vision, customer experience design and delivery, and success metrics. They inspire their employees to help make the vision a reality.

### *Identify high-level goals*

With vision in hand, you're ready to develop the guideposts you'll use to make sure you and your team are headed in the right direction. Your goals describe what you hope to accomplish.

Business goals justify your CX initiative. In most organizations, CX investments are based on the belief (and backed by research) that organizations who adopt CX principles earn increased loyalty and improve their financial position. That's why the business key performance indicators (KPIs) used to measure the impact of a CX program will look familiar. They are most likely the metrics you use to measure organizational health now, based on your industry, maturity, and other factors. Examples include: decrease annual customer churn, increase revenue, boost customer lifetime value, improve market share, and others.

Customer experience goals are objectives you'll use to measure the success of your CX efforts. These may be department specific, and some may reflect what actually happens—wait times, average order value, and others. Some gauge perceptions—customer satisfaction scores or how easy they felt the experience was. And some will follow outcomes, such as repeat business, or cancellations. More organizations are also prominently including employee experience in their key goals (see Chapters 2 and 3).

We will explore goals, metrics and outcomes in more detail in coming chapters. For now, a compelling vision and a few high-level goals are what you need to get the wheels turning. Don't overwhelm your efforts with too many goals and metrics just yet. Walk before you run.

### Avoid common pitfalls

"75% of customer experience initiatives fail!" That's a sensational headline. And one, even with a modest search of cases and literature, you'll see often (in fact, estimates go as high as 93 percent)<sup>11</sup>. My question is, if your focus on customer experience fails, what's the alternative? *Not* focusing on

customer experience? That just doesn't make sense. Really, your organization has no choice but to ensure that you're focused on customer experience, and that it succeeds.

Now, there are some tough situations—and you might be part of one. Leaders in some organizations don't prioritize CX and won't invest in it. Their focus is on revenue, strategic acquisitions, or other priorities. Even more challenging, in my opinion, are those cases where CX is given lip service but provided little support. They say the right things but don't back it up. If you are reading this book, and part of such an organization, I understand. You are fighting the good fight! My encouragement is to hang in there. Continue to make your case. Ultimately, your focus on customer experience will prevail.

Even in the most favorable environments, customer experience can be misunderstood or underappreciated. I want to put my hand up here and make a few friendly recommendations. One is to set the right expectations. Often, the hardest part of a transformation as big as customer experience is simply deciding how to get started. That can be true whether you are a CEO who is spearheading an experience management initiative for 20,000 people, or a customer service team leader who is looking to kindle a flame in a team of four. My encouragement is to use the framework we cover in the book—but go into it with the right mindset. Establish the expectation that customer experience takes time—in fact, it doesn't have a finish line. It's an ongoing transformation that will shape who you are as an organization, and how you operate.

Also, the words you use when you talk about customer experience are important. It's not a program and shouldn't be called one. A program or project implies a short-term effort with a finish line. I use the term initiative, but depending on who you're talking to, even that can be misleading. Words such as transformation, movement, culture shift, and even revolution can help set realistic expectations with colleagues and employees.

Don't expect others to jump on board without a good reason to do so. An important part of launching this journey is to crystallize *why* customer experience transformation is so important. This can't be another run-of-the-mill project that employees can hunker down and wait out until the next initiative comes along.

“ *The words you use when you talk about customer experience are important. It's not a program and shouldn't be called one.* ”

And one more word to the wise: find allies to stand with you. The reality is, even a CEO can't do the work of customer experience alone. Think about other leaders around you who have a natural propensity toward customer experience, and get them on board as soon as possible.

Fortunately, it's quite easy to create a compelling case for CX. Organizations who are doing customer experience well are winning over customers and acquiring market share. Laggards are in danger of extinction. By setting clear expectations and establishing a strong roadmap, your chances of success are exponentially higher.

In time, you'll see the fruits of your efforts. Results will likely include improvements in revenue, market share, customer and employee engagement, new efficiencies, and others—the BIG things you're really after. In every case I've seen and every company I've worked with, the enthusiasm that customers have about your organization is the ultimate measure of how effective your approach is. That enthusiasm pays big dividends. (We'll explore benefits, costs, and investments in Chapter 9.)

### *Upward and onward*

I am so excited for you as you embark on this transformation. Pursuing better customer experiences won't guarantee your customers will wear tattoos of your brand, as some Harley-Davidson customers do. But whether yours is a small firm, startup, government agency, non-profit, or multinational corporation, they will *feel* the alignment between their experiences and your vision and brand. Your products and service will resonate, and they'll tell others great things about your organization.