



CX Mindset and Influencers Workshop

BRAD CLEVELAND

Course Workbook

CHEP

A Brambles Company

Welcome

We're excited to welcome you to the CX Mindset and Influencers Workshop! Before we get together as a group, there are some preparatory steps we'd love for you to take. They will get things off to a running start and our time together will depend on all having gone through them.

- Please go through the short LinkedIn Learning online course, "[The 10 Pillars of Customer Experience](#)." As you go through the 10 Pillars course, please have this workbook handy. With each pillar, we've included an example of a CHEP opportunity for improvement. Some will relate more than others to your area of influence, and we encourage you to view them as idea starters. If you'd like to make notes for yourself, such as questions or actions you might take, there's a place to do so on each page.
- We've also referenced additional resources in the workbook that can help you explore specific topics at a deeper level. These are optional, and there's no need to go through them before we meet.
- You will receive a survey before the course—please fill it out as soon as possible, as it will help guide our focus and discussions in the workshop.
- In the workshop, we'll be asking for two actions you're willing to take to move customer experience forward. Please be thinking about ideas!

Note that documents may refer to CHEP or Brambles. In either case, they are referring to the overall organization: CHEP/Brambles (CHEP a Brambles company).

Please feel free to reach out with any questions: brad@bradcleveland.com.

Thank you!

Warm Regards,
Brad

Email: brad@bradcleveland.com

Mobile: [+1-410-279-7570](tel:+1-410-279-7570)



Introduction: The definition of customer experience

Customer Experience describes our customer's perception of their end-to-end journey with us through our people, systems, products and services.



POWER TIP

Cultivate a CHEP-wide understanding of customer experience—what it is and why it matters.



Example Opportunity for Improvement:

Leaders across CHEP/Brambles have varied views on customer experience (CX). Some prioritize metrics, others value standardization but worry about one-size-fits-all approaches, and some see CX primarily as a tool for sales and marketing insight. How could you best help your team understand what CX is and why it is important?

For a Deeper Dive:



Book excerpt: *What Is Customer Experience?*, from *Leading the Customer Experience*.
bradcleveland.com/CHEP

Notes/Action Items:



Pillar 1: Vision and goals

Make the connection between what each CHEP employee does and CHEP's vision and goals. Work them into conversations. Use them as the backdrop to priorities and decisions.



POWER TIP

Have each area or team develop an aligned and simple supporting vision.



Example Opportunity for Improvement:

When referring to CHEP's vision and goals, some employees mention the Board's goal to become more customer-centric, or refer to specific NPS targets, while others highlight CHEP's role in sustainable supply chain solutions, or mention the successful internal focus on workplace safety. Could the CX initiative be an opportunity to clarify and align all of these perspectives?

For a Deeper Dive:



Book excerpt: Define and Communicate Your Vision and Goals, from *Leading the Customer Experience*.
bradcleveland.com/CHEP

Notes/Action Items:



Pillar 2: Employee engagement

Engagement is the enthusiasm or emotional commitment an employee has to CHEP and the work they do. The key driver of engagement is purpose.



POWER TIP

Leverage the question, are there requirements in your job that are at odds with doing what's best for customers?



Example Opportunity for Improvement:

In any organization, job requirements or the metrics used to measure them, can conflict with optimal customer experience. For example, CHEP's old OTP (On Time Performance) metric incentivized employees to cancel incomplete orders since these were excluded from (didn't negatively impact) the metric. The metric Delivered In Full and On Time (DIFOT) is now being implemented in a way that encompasses canceled orders. What similar opportunities exist in your sphere of influence?

For a Deeper Dive:



Traits of Engaged Employees
bradcleland.com/CHEP

Notes/Action Items:



Pillar 3: Voice of the customer

Feedback from our customers is like oxygen—CHEP needs it to thrive and to build the future. Feedback from many sources creates a view that is far more complete and compelling than what surveys alone can provide. NPS and C-sat metrics are not enough.

10 Customer Expectations Service Interactions

<ul style="list-style-type: none"> • Be accessible (<i>in the channels I prefer</i>) • Treat me courteously • Be responsive to (<i>and anticipate</i>) what I need and want • Do what I ask promptly • Provide well-trained and informed employees 	<ul style="list-style-type: none"> • Tell me what to expect • Meet your commitments and keep your promises • Do it right the first time • Follow up • Be socially responsible and ethical
---	--

POWER TIP

Compare feedback from customers and CHEP employees.

Example Opportunity for Improvement:

CHEP recently lost a customer due to a perceived price issue. On further investigation, the core problem was poor communication more than the price hike itself. While the customer hadn't responded to surveys in years, believing "nothing changes," a very open and transparent conversation unveiled the true concerns—lack of empathy and how the change was relayed. How could a better ongoing customer relationship facilitate necessary price adjustments, and what's a good way to communicate these changes?

For a Deeper Dive:



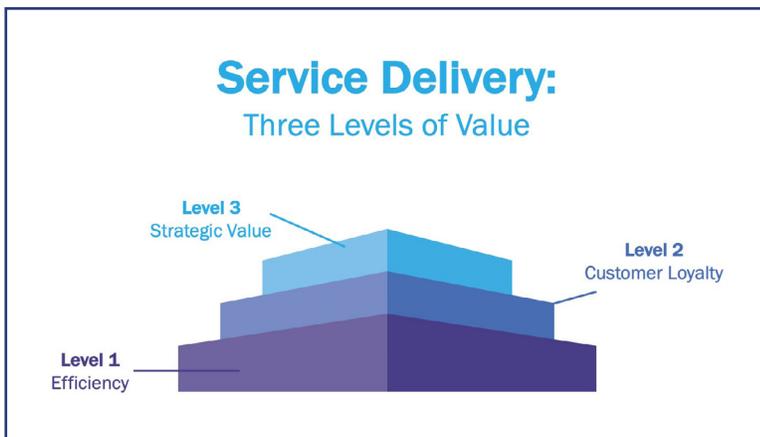
Customer Expectations Worksheet
bradcleland.com/CHEP

Notes/Action Items:



Pillar 4: Customer service

When effective, customer service makes it easy for our customers to resolve issues and provides extraordinary opportunities for us to listen and learn.



POWER TIP

Leverage strategic insight from customer service to improve all areas of CHEP.



Example Opportunity for Improvement:

Every day, your customer-facing services have visibility on CHEP’s products, services and processes. Those insights can help the entire organization innovate. But this process doesn’t happen on its own and insights can easily fall through our fingers. What are ways you’d recommend to leverage this opportunity?

For a Deeper Dive:



Book excerpt: *Boosting the Value of Customer Service, from Leading the Customer Experience.*
bradcleveland.com/CHEP

Notes/Action Items:



Pillar 5: Customer narrative

To design and deliver great customer experiences, we have to understand the customer’s journey—their story. The best source is spending time directly with customers.



POWER TIP

Capture and socialize customer stories.



Example Opportunity for Improvement:

Customer stories are powerful. They come from direct conversations with customers, verbatims in surveys, and other sources. (One customer recently described the sinking feeling he gets when the truck door opens to reveal pallets that aren’t consistently CHEP blue on the edges. “They look defective, even if they aren’t—we feel the need to inspect.” He describes his elation when he sees that solid CHEP blue from top to bottom.) Could stories relating to different functions be circulated more widely?

For a Deeper Dive:



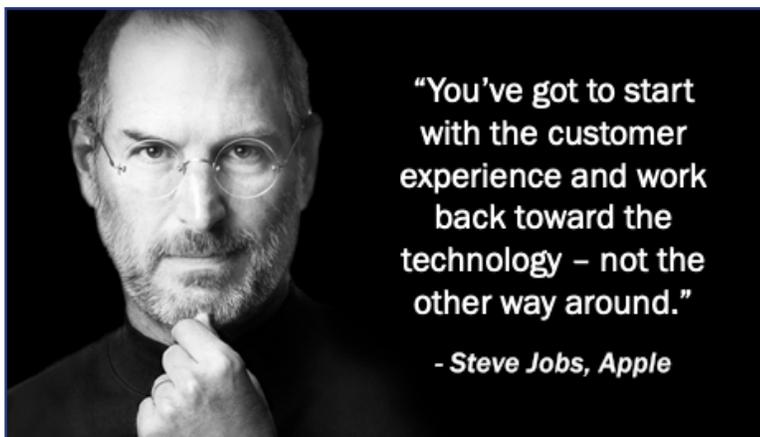
Example CHEP Customer Journey Map
bradcleland.com/CHEP

Notes/Action Items:



Pillar 6: Processes and technology

As expansive as the topic of processes and technology is, three principles are at work in the most effective organizations—diverse perspectives, collaboration, and thinking that challenges the status quo.



POWER TIP

Keep the priority on solutions that drive simplicity and ease of use.



Example Opportunity for Improvement:

There are substantial improvements to technology in the works at CHEP, which will better address pallet tracking, proactive communication with customers, information on customer orders and history, and others. In the meantime—and as is true for every organization going through digital transformation—there’s the art of the possible. What can you do with what you have? What workarounds exist (e.g., the New Zealand region harnessed spreadsheets to guide proactive conversations with customers)? Where do these needs exist with your team?

For a Deeper Dive:



Book excerpt: *Shaping Processes and Technology*, from *Leading the Customer Experience*.
bradcleveland.com/CHEP

Notes/Action Items:



Pillar 7: Customer advocacy

Customer advocacy stems from a culture where, ideally, every CHEP employee in every role is “advocating” for our customers.

Customer advocacy is...

1) The actions you take to focus the organization on doing what is best for customers, 2) which rewards you with loyal customers who advocate for your organization.

Source: Cleveland, Brad. Leading the Customer Experience. New York, Kogan Page, 2021.

POWER TIP

Map the work and decisions of each job role to the impact on our customers.

Example Opportunity for Improvement:

Customer advocacy seems like a vague concept to those in roles that are removed from direct customer interaction. And yet, HR’s processes for getting call center agents hired and in place directly impacts customers. Billing’s work on entering payments impacts customers’ financial limits and purchasing power. You can go through every role and see powerful and tangible connections to customers. What roles would most benefit from mapping their work to customer experience?

For a Deeper Dive:



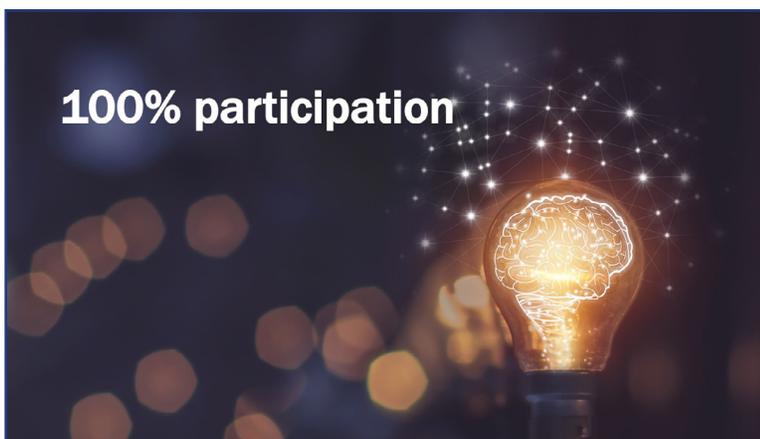
See the LinkedIn Learning course, [Customer Advocacy](#)

Notes/Action Items:



Pillar 8: Innovation

Innovation requires a process—removing barriers, management support, a process for collecting ideas, and implementing solutions that are priorities.



POWER TIP

Celebrate innovation and thoughtful failure.



Example Opportunity for Improvement:

There are four major components of enabling innovation: 1) Remove barriers (e.g., don't know what to do with a good idea), 2) management support, 3) method/system for gathering, evaluating and tracking ideas, and 4) implementing ideas that have merit, then showing the impact. Also, while all ideas should be encouraged, the usual focus should be on innovation that makes things better for customers. In your view, which steps need the most attention?

For a Deeper Dive:



See LinkedIn Learning video, [Strive for Participation in Product and Service Innovation](#)

Notes/Action Items:



Pillar 9: Investments

Customer experience requires resources built on a business case. There are two categories of considerations: returns on improvement (ROI) and costs of inaction (COI).

<p>Returns on Improvements</p> <ul style="list-style-type: none"> • Customer loyalty • Brand promotion • Operational improvements • Product and service innovation • Employee engagement 	<p>Costs of Inaction</p> <ul style="list-style-type: none"> • Customer defection • Brand damage • Recurring problems • Compliance, safety, legal • Employee dissatisfaction
--	---

POWER TIP

Build a toolkit of ROI and COI calculations for your team's efforts to improve the customer experience.

Example Opportunity for Improvement:

One of the major hurdles to improving CX within CHEP is the perspective—and correctly so—that the company is already successful. Financials are better than ever, and the company's first mover advantages have created structural barriers to competitors. The key question is, how much better could we be? What would an elevated CX do for our future, our business results and how customers and employees feel about CHEP? Think through the five aspects of ROI and the five aspects of COI, and determine which help make the case for a stronger focus on customer experience.

For a Deeper Dive:

[ROI Calculations Toolkit](http://bradcleveland.com/CHEP)
bradcleveland.com/CHEP

Notes/Action Items:



Pillar 10: Leadership

Leadership is the cornerstone of all of the pillars. It requires courage to push for change and involves knowing where to focus your efforts and priorities.



POWER TIP

Align your own professional interests with how you can positively impact CHEP's future.



Example Opportunity for Improvement:

One of the recurring opportunities mentioned by CHEP leaders is to be more proactive with communication with colleagues and customers. Sometimes, the messaging itself can change—e.g., compare these two approaches from the travel sector: “Not much we can do; the weather forced these cancellations and the next flight won’t be until tomorrow.” Or, “We apologize for the impact of the weather—I can get you on the first flight out tomorrow.” What leadership steps are required to positively impact this simple but powerful opportunity within CHEP and with customers?

For a Deeper Dive:



See the LinkedIn Learning course, [Customer Experience Leadership](#).

Notes/Action Items: