Use This Recipe To Improve CX And Drive ROI
#1 Don’t start cooking until you know for whom and why
#1 Don’t skip the goals!
First define the metrics that you’ll use to gauge CX program or CX project success

Why?
• Guide all decisions
• Confirm you stay on track along the way
• Show your impact afterwards

How?
• Identify the immediate project goals
• Find out how the project contributes to company success
Improving CX can improve revenue, cost and risk. What are your company’s key business goals for CX?

**CX goals**
- Retain customers.
- Sell more products.
- Add more customers.
- Charge higher prices.

**CX project or team goals**
- Reduce time-to-market

**CX goals**
- Reduce cost to sell.
- Lower cost to serve.
- Reduce costs of employee hiring.
- Lower customer acquisition costs.

**CX project or team goals**
- Accelerate/streamline design, execution, and testing

**CX goals**
- Mitigate regulatory pressure.
- Reduce credit risk.
- Improve employee retention.
- Preserve rating by capital markets.

**CX project or team goals**
- Reduce risk of bad investments

Source: Forrester report, “Why CX: Proof That Investing In Experience Improves Revenue, Costs, And Risks”
What did others observe? Most CX teams seen top-line benefits as a result of investing in CX

What are the top three business benefits you have seen as a result of investing in CX?

- Increased customer retention: 58%
- Increased revenue growth: 36%
- Increased customer cross- and/or up-sell: 31%
- Increased number of customer recommendations: 30%
- Savings from reduced service costs: 27%
- Increased employee retention and productivity: 18%
- Improved profit margins: 11%
- Reduction of regulatory or compliance risks: 11%
- Other: 9%
- None: 7%
- Prefer not to answer: 4%

Base: 298 members of CX teams. Source: Forrester Global State Of CX Teams Survey 2020

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VALUE REALIZATION FRAMEWORK

Program Purpose
What is the overarching goal or problem to solve?

**Project #1**
- Project to help realize the overall goal
  - **Activities**
    - Breakdown of the Work & Activities Required
  - **Adoption**
    - Communication & Change Management
  - **Value**
    - Metrics to Measure Project Success

**Project #2**
- Project to help realize the overall goal
  - **Activities**
    - Breakdown of the Work & Activities Required
  - **Adoption**
    - Communication & Change Management
  - **Value**
    - Metrics to Measure Project Success
Checklist: Have you defined effective success metrics?

<table>
<thead>
<tr>
<th>Category</th>
<th>Criterion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevance</td>
<td>❑ The metric tracks or ladders up to an important goal for your company</td>
</tr>
<tr>
<td></td>
<td>❑ The metric tracks or ladders up to an important goal for your boss</td>
</tr>
<tr>
<td>Viability</td>
<td>❑ You can measure the metric repeatedly or at scale</td>
</tr>
<tr>
<td></td>
<td>❑ It doesn’t take too much money or effort to measure the metric</td>
</tr>
<tr>
<td>Suitability</td>
<td>❑ The metric measures the goal with accuracy (validity)</td>
</tr>
<tr>
<td></td>
<td>❑ The metric delivers a consistent result every time (reliability)</td>
</tr>
<tr>
<td></td>
<td>❑ Changes in the performance on the metric are meaningful, not random</td>
</tr>
<tr>
<td>Effectiveness</td>
<td>❑ You can easily explain the metric to others</td>
</tr>
<tr>
<td></td>
<td>❑ Changes in the performance on the metric help pinpoint what to do next</td>
</tr>
</tbody>
</table>
Defining success metrics is a critical input into prioritizing your work.

Source: Forrester report, “Advance Your CX Prioritization With Forrester’s Modeling Tool” © Forrester Research, Inc. All rights reserved.
#2 Successful kitchens are loud
#2 Build a CX program ecosystem! Identify your collaboration strategies with all contributing parties in your ecosystem

Why?

• Gives you and everybody else a sense of how all parts work together
• Lets you find and fix collaboration issues

How?

• Identify your internal and external CX program stakeholders and contributors
• Add technologies and key processes to the map
• Share the ecosystem with each contributor
Most CX pros say a lack of cooperation prevents CX improvements.
Getting stakeholders on board is a big obstacle to CX program success.

“What are the biggest obstacles that stand in the way of your CX program’s success?”

- Buy-in: 48%
- Budget: 17%
- Bureaucracy: 13%
- Tech: 13%

Base: 307 respondents
Source: Forrester’s Q2 2021 State Of VoC And CX Measurement Programs Survey
Build And Understand Your CX Program Ecosystem
GOVERNANCE FRAMEWORK

Governance Expectations

Objectives
- Progress review & ROI assessment
- Strategic program direction/decisions
- Share and align on mutual vision

Meeting Frequency: Quarterly

Objectives
- Progression on plan execution & management
- Project issue tracking & resolution
- Future planning and alignment on key priorities

Minimum Meeting Frequency: 1 per month with senior sponsor, quarterly with executive.

Objectives
- Progression against program/project plan
- Problem/issue resolution
- Sharing of new products, releases, priorities
- Quarterly scorecard review & health assessment

Minimum Meeting Frequency: 1 per week, more as needed.

Objectives
- Setup
  - Execute setup of system and platform and core processes and functions
  - Progress against standardized project and execution plans (Sparq / NPS / Survey / JumpStart)
  - Timeline: Rapid time to value implementation launching solution in the first 30 days

Minimum Meeting Frequency: min once a week, more as needed.

Program Level

Executive Sponsorship
Executive Sponsor
Sr. Sponsor
Program Lead

Program Steering
Sr. Sponsor & PM
Management Representation from Cross Org
Vendor(s) Sr. Sponsor(s)

Value Realization Program
Program Lead
Customer Success Manager
Vendor(s) Project Manager
Cross Functional Representation (Org Stakeholders)

Project Management
Project Manager / Admins
Survey Authors
Technical Consultants

Alida Support

CX/Value Realization
(CX/Insight Consulting & Program Management)

Strategy & Direction

Escalation Path

Rules of Engagement
- Primary interface to the customer executive sponsor

Rules of Engagement
- The Senior Sponsor is the next level of escalation beyond the CSM - project, product, priorities, staffing, etc.
- Responsible for monthly status reporting, program health monitoring, prioritization, risk / issue actioning.

Rules of Engagement
- First point of contact for all project, operational and process issues.
- Day to day execution of survey creation, dashboard edits/changes, workflow enhancements.
- Issues log will be single point of truth for all specific requirements.
- Technical support issues should be brought directly to the technical support team for fastest resolution.
5 effective collaboration strategies – pick your best bet

1. Build an insights engine
2. Translate the CX vision to daily behaviors
3. Break silos with journeys
4. Take action through process improvement
5. Make it rain with new customers
5 effective collaboration strategies – pick your best bet

<table>
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<tr>
<td>Build an insights engine</td>
<td>Data and insights, marketing functions</td>
<td>Continuously scan for turning points that trigger customer loyalty along with changing patterns in customer behavior.</td>
<td>Be more responsive to customer needs and expectations. Be in a strong position to move on market trends before competitors do.</td>
<td>• Gojek</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Immigration, Refugees and Citizenship Canada</td>
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<td></td>
<td></td>
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<td>• Ping An Insurance</td>
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# 5 effective collaboration strategies – pick your best bet

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| **1** | Build an insights engine | Data and insights, marketing functions | Continuously scan for turning points that trigger customer loyalty along with changing patterns in customer behavior. | Be more responsive to customer needs and expectations Be in a strong position to move on market trends before competitors do. | • Gojek  
  • Immigration, Refugees and Citizenship Canada  
  • Ping An Insurance |
| **2** | Translate the CX vision to daily behaviors | Culture and brand functions | Channel customer and employee empathy to connect the CX vision to everyday work on the front line and in the back office. | Enable colleagues to make daily decisions within each functional area and business line that boost customer experience and give employees a sense of purpose. | • Blue Cross and Blue Shield of Kansas City  
  • Caterpillar  
  • Crowe  
  • Volkswagen Group Australia |

Source: “Leverage Five Collaboration Strategies To Power CX Transformation” Forrester report
# 5 effective collaboration strategies – pick your best bet

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<td></td>
<td></td>
<td>• Sage Software</td>
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<tr>
<td><strong>Take action through process improvement</strong></td>
<td>Operations and lean Six Sigma functions</td>
<td>Tap operational expertise to improve process efficiency and customer outcomes.</td>
<td>Set expectations with a test-and-learn approach. Show tangible improvements to incrementally build support and budget.</td>
<td>• Fulton County Government</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• NRMA Insurance</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>• Telstra</td>
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<td>• Vanguard</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Make it rain with new customers</td>
<td>Sales, strategy, product, and marketing functions</td>
<td>Drive sustainable growth by improving prospect-to-purchase and enrichment journeys.</td>
<td>Make an outsized impact on strategic growth initiatives.</td>
<td>• HP</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Kroger</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Manulife Hong Kong</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Nissan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• United Concordia Dental</td>
</tr>
</tbody>
</table>
Unsure whom to engage? Prioritize stakeholders!

- Identify stakeholder groups
  - List potential organizational allies

- Segment stakeholder strength
  - Influence
  - Alignment

- Determine ease of engagement
  - Interest
  - Accessibility

- Review stakeholder map
  - Develop game plan

- Continue to review and adjust
  - Org changes
  - CX program changes
  - Learning

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.
Prioritize stakeholders by influence and alignment

**High alignment with CX metrics:**
- Customer satisfaction, loyalty, advocacy

**Low alignment with CX metrics:**
- Customer satisfaction, loyalty, advocacy

1. **Mountain movers**
   - Can have an outsized impact on CX transformation
   - Should be your first priority

2. **Trusted troops**
   - Can help embed customer-centricity across the organization
   - Recruitment pool for CX champions

3. **Big-shot bystanders**
   - Can help drive momentum for enterprise transformation
   - Wait until you have created traction to engage

4. **Everyday employees**
   - Most likely to come along for the ride once other groups are involved
   - Limit to broad communications

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Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.
#3 Taste as you go
#3 Face facts and don’t be shy: Continuously measure success and solicit your internal customers’ feedback

**Why?**

- Avoids coming up empty-handed when somebody questions progress
- Helps build a library of case studies
- Strengthens stakeholder relationships

**How?**

- Before, during and after every project
- Always, always ask stakeholders how you help them be more successful
### Sample discussion questions at key check points for better value-stories

<table>
<thead>
<tr>
<th>Program / Workstream / Project</th>
<th>Preparation</th>
<th>Execution</th>
<th>Post-project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal-alignment</td>
<td>⋯</td>
<td>⋯</td>
<td>⋯</td>
</tr>
<tr>
<td>• How should the project contribute to the targets you have in your role?</td>
<td>⋯</td>
<td>⋯</td>
<td>⋯</td>
</tr>
<tr>
<td>• What are you hoping the project will do for your career?</td>
<td>⋯</td>
<td>⋯</td>
<td>⋯</td>
</tr>
</tbody>
</table>

| Recurring check-ins           | ⋯           | ⋯         | ⋯            |
| • Are your key goals changing and how? | ⋯           | ⋯         | ⋯            |
| • Are conditions changing and how? | ⋯           | ⋯         | ⋯            |
| • Which quick wins have we achieved already? | ⋯           | ⋯         | ⋯            |
| • Have we changed any hearts and minds yet? | ⋯           | ⋯         | ⋯            |

| Post-Mortem                   | ⋯           | ⋯         | ⋯            |
| • Did the project contribute to your role’s targets and how? | ⋯           | ⋯         | ⋯            |
| • Did the project contribute to your personal success and how? | ⋯           | ⋯         | ⋯            |

### Questions to include in each conversation:

• What is / was going well in working with us?
• Which problems do / did you experience when working with us?
• How can we serve you better?
You will receive coaching and tangible suggestions from your Customer Success team through these touchpoints.

Using the value framework, they provide advice and content to help you realize your potential.

**Success Planning**

Develop a plan to support you in achieving your business goals and maximizing the value of your investment.

**Quarterly Review**

Deep-dives into how you can tap into value across all 4 dimensions and what we can collectively do to keep you focused on achieving your business goals.

**Check-ins & Monthly Snapshot**

Regular informal check-ins and a monthly snapshot to support you in keeping up to date about new features and keeping your community healthy.

**Annual Review**

Capturing the impact your community has made on your business and refining your success plan.
#4 Plan the presentation as carefully as the meal itself
#4 SHOW your value: Design collateral and practice your pitch

**Why?**
- Show your contribution to company success
- Show that you can scale this across other projects

**How?**
- Feature proof points that show how you contribution to KPIs or key strategies
- Show that you are using a repeatable way of working
CX pros know their reporting isn’t engaging enough

55% of CX pros say that they don’t create reports and dashboards that stakeholders find highly engaging.

Source: Q2 2020 State Of VoC And CX Measurement Programs Survey
# The CX Dashboard Planning Canvas

## Objectives

**Function**
- What will the dashboard be used for?
- Is this designed to be a decision-making tool? A status report?
- A way to bring the voice of the customer into the conversation?

**Success Metrics**
- How will you measure the success of this dashboard? (e.g., monthly frequency of access by organization and employees, time spent in dashboard by organization and employees, number of customer-focused decisions made based on dashboard insights)

**Continuous Improvement**
- How often will you evaluate the dashboard and dashboard components for relevance, engagement, and action? (e.g., Every six months, we will pause, whether stakeholders still find the dashboard engaging)

## Audience

**Roles**
- Who is the dashboard for? At what levels and within what functions of the organization do the users work? (e.g., This dashboard is intended for regional sales and support leaders along with their direct reports)

**Engagement**
- How will you get people to notice the dashboard? (e.g., This dashboard will be presented by the CX Steering Committee at the monthly regional sales meeting)

## Content

**Metrics & Data types**
- What metrics does the audience need to see? (e.g., organizational outcomes, segment, market, performance, account or partner relationships, individual customer relationships, journeys, transactions)
- What data types will aid in telling your story? (e.g., metrics and numbers, verbatims, videos or recordings)

**Data Sources**
- Where is the data coming from? (e.g., Operational Systems, Analytics Team, CRM system, VOC platform/program, Social listening, Verbatims and customer stories)

**Data Visualization**
- What charts are best suited for the data? (e.g., column charts, tables)
- How will you showcase data points to improve data understanding by stakeholders?
- How will you highlight changes in key metrics to focus the audience's attention?
- How can you use imagery to bring the insights to life and to make the dashboard look appealing and engaging?

**Context**
- Who will be providing context beyond the data? Is this a presentation with voice over, a written report, a self-service tool?

## Technology

**User-Facing**
- Which tools will you use to present the dashboard in? (e.g., Business Intelligence, CRM, analytics platform, company intranet)
- What technologies would you need to support the selected data types (including numbers, visuals, video or voice recordings)

**Back-End**
- Which tools will you use for data gathering and analysis? (e.g., customer feedback management, social listening, Business Intelligence)
- Who is responsible for using these tools to create the dashboard?

## Frequency

**Distribution**
- How often will you publish the dashboard? (e.g., Annually, Quarterly, Monthly, Always On)

## Actions

**Workflow**
- What workflow will you put in place to make sure the desired action is taken? (e.g., if a customer makes a transaction of $5, sales or less, open a ticket and escalate to customer support)

**Cadence**
- How often will people make decisions based on this data?

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A stand-out example: Agilent’s journey-centric, engaging dashboard

Customer Experience Update Q1 FY21

“Thanks for the super quick response from the team behind the purchase - it’s really appreciated." (Country)

"The on-site installation engineer has a good attitude and is very patient. The on-site training screen recording is very thorough." (Country)

FY21 CX Priorities – Q1 Highlight

Customer Experience Priority #1
1. Quarter highlight by journey 1.Q. 2.Q. 3.Q.
Customer Experience Priority #2
1. Quarter highlight by journey 1.Q. 2.Q. 3.Q.
Customer Experience Priority #3
1. Quarter highlight by journey 1.Q. 2.Q. 3.Q.

Research & Projects – Q2 Highlight

Agilent Brand Preference – COVID-19
This was a blinded third party study taken from the brand preference study. A total of 526 online and telephone interviews were conducted in the US (76), China (201), UK (60), and Germany (66).

Supplier Support During COVID-19:
Agilent outperforms competitors on going out of their way to support customers’ lab operations during emergency situations.

Supplier Support Importance:
Top most important needs coming out of the COVID-19 crisis.

Involvement in Supporting COVID-19 Therapies/Treating Vaccines:
Overall, a quarter of labs are involved in supporting COVID-19 therapies, testing, or vaccines. As expected, those involved in COVID-19 efforts are more likely to be in Life Science Research.

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Show the value of each project with a case template

<table>
<thead>
<tr>
<th>Project name</th>
<th>Online Banking Set up 2.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem Statement</td>
<td>Customers have given feedback that the set-up is confusing, leading to delays in completing it and hesitation to make the bank their primary bank</td>
</tr>
<tr>
<td>Project Description &amp; Goals</td>
<td>Improve the online banking set-up experience to reduce the number of those who don’t complete it and increase number who feel confident</td>
</tr>
<tr>
<td>Business Benefits</td>
<td></td>
</tr>
<tr>
<td>• Enabling growth in the more profitable digital savvies segment</td>
<td>• Clarity on the set-up process</td>
</tr>
<tr>
<td>• Reduced number of calls to get help with set-up</td>
<td>• Being able to use the account right away, without bad friction or any additional effort</td>
</tr>
<tr>
<td>• Higher share of customers who chose the bank as primary</td>
<td>• Feeling savvy about banking competence</td>
</tr>
<tr>
<td>• Higher revenue from customer retention/satisfaction</td>
<td></td>
</tr>
<tr>
<td>• Contributes to the Digital first strategy</td>
<td></td>
</tr>
<tr>
<td>Customer Benefits</td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td></td>
</tr>
<tr>
<td>• Investment in person-hours and technology required for research, design, coding and integration with systems</td>
<td>• 214%</td>
</tr>
<tr>
<td>• Time, effort and resources for training in-branch personnel to know the new set-up process</td>
<td></td>
</tr>
<tr>
<td>• Training material for customers</td>
<td></td>
</tr>
</tbody>
</table>
Summarize the business value you deliver with a one-sentence business case

**Structure**

- We propose to do A
- To improve B
- Which will bring us economic benefit C
- At a cost of D
- Delivering an ROI of E

**Example**

- We propose to redesign our IVR login process
- To reduce the number of customers who bail out and call a live agent
- Which will lower our contact center costs by $4 million per year
- At a cost of $20,000
- Delivering an ROI of 199%

Source: Forrester report, “Why CX: Proof That Investing In Experience Improves Revenue, Costs, And Risks”
Wrap it all up in a good data-and-value story with a 5-step playbook

Create your story

**Step 1**
Define the business purpose: actions(s) you are working to drive.

**Step 2**
Analyze the audience’s frame of mind.

**Step 3**
Structure your story with a simple three-part outline.

Prepare for the presentation

**Step 4**
Rehearse your story with colleagues.

**Step 5**
Condense your story — always have a “speed-through” version of a key story ready.
PROGRAM SOCIALIZATION
SHARE THE STORY

52 WEEKLY
- Real Time Dashboards
- Research Reports

12 MONTHLY
- Insights Stories
- Stakeholder Hub
- Value Tracker
- Monthly Status Meetings
- Infographics

04 QUARTERLY
- Quarterly Business Reviews
- Value Realization Plan
- Town Halls
- Quarterly Stakeholder Survey

01 ANNUALLY
- Annual Summit
- Value Planning
Use This Recipe To Improve CX And Drive ROI

#1 Don’t skip the goals

#2 Build a CX program ecosystem

#3 Face facts and don’t be shy

#4 SHOW your value
THANK YOU