

THE ULTIMATE Customer Experience Q&A eBook



The 17 experts
on CXPA's CX
Expert Panel

Get Insights on 14 Burning CX Questions

A free eBook from CXPA



Customer Experience
Professionals Association™

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The Customer Experience Professionals Association (CXPA) has created a panel of 17 CX Experts. These Experts answer questions on a regular basis that come from CXPA members.

The CX Experts are professionals each with over 10 years of experience in customer centric strategies and tactics. Their professional experience includes notable organizations across the globe, spanning diverse industries. The 17 CX Experts provide a proven track record of success in the customer experience discipline and are passionate about helping others.

This eBook is a compilation of 14 of the questions the Experts have recently answered. The format is Q&A style. We hope you enjoy it!

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VOC Scope and Ownership



QUESTION

I work for a multi-national company in the B2B and B2C space (direct sell), with responsibility for Global VOC Programming, which resides currently in QA. I have many questions as I work to re-frame this space, but will start at the very beginning. We have a very narrow scope of what we have formalized as the VOC space, namely management and assessment of Product Quality Complaints and Adverse Events for compliance and new product development purposes. We do have many other disconnected field facing data and program owners throughout the company – some in Sales, Returns staff, physical Shops in different parts of the world, Contact/Call Centers, Market Research, Consumer Product Research in Product Development (R&D) and many others. This feels sub-optimal when you try to piece together any big picture or strategic moves.

My questions are:

1. What is the typical scope for any VOC program?
2. If there isn't a typical definition, what could be included in the span of VOC responsibilities?
3. If VOC is centralized, who typically owns it from a departmental or divisional perspective?



PETER HAID
CX Expert

Yes, you are entering a very broad space with lots of options but let me suggest the following as a starting point for you to react to and others to chime in on.

Typical Scope of VOC

VOC programs run in all sizes and can even cross every department in a company. A “typical” scope for a company at full maturity would be to run a “relationship” study ~2x/yr. and several transactional studies across key areas in the customer lifecycle. I've seen companies with transactional studies that run new samples every day based on transaction volumes. It typically aligns with awareness, purchasing/ordering, delivery, use, billing, and support. You can find the connections between the relationship study drivers of loyalty and connect that back into transactional improvement areas. There are a lot of methods of collecting VOC, but in this example I'm speaking of simply the email survey method that most companies use (with text analytics). The MOST important part of the VOC scope is to have plans in place for closing the loop with customers based on triggers you design (good, bad, etc.) and having the analytics used for creating action plans with key stakeholders. The insights and action planning part should be as transparent as the culture will allow at this point... all the way down to employee and all the way up to execs is the goal.

Keep in mind that not all of these transactional studies may be worth your time/\$\$\$ and that working through a phased rollout based on customer (and business) priorities is completely normal. It can take 6-18 months to launch really large programs and make them useful.

SPAN of VOC Responsibilities

The span of what a VOC team is responsible for largely depends on how the team is setup in the organization and also what other CX initiatives need to connect into the plan. VOC, in my humble opinion, is myopic without Voice of Employee (VOE) efforts and connections to a corporate CX strategy. Here is a sample list of what VOC teams typically work towards and I left out all the VOE stuff (it follows a similar pattern):

- Define customer experience standards and metrics and how they will be used within the organization
- Clearly define positive, neutral, and negative breakpoints in customer experience metrics

- Ensure that customer experience metrics consider business segmentation
- Ensure that the organization's balanced scorecard includes customer experience metrics
- Consistently review and distribute key insights of customer interactions, customer experience metrics, and action plans to leadership
- Review internal operational metrics from key moments of truth to gain insight on corporate reality versus customer perception
- Create a connection between customer experience metrics and key business outcomes (e.g., financial, operational) as a way to track and validate the success of customer experience improvements
- Ensure that the internal project road map and funding criteria are informed by the voice of the customer
- Conduct customer journey mapping to find key moments of truth for the organization and for vendors and partners
- Gather solicited feedback from customers related to their overall relationship with the organization
- Gather solicited feedback from customers related to transactional moments of truth
- Analyze transactional and relationship feedback with the appropriate customer segmentation to add value to the audience absorbing it
- Use a customer communication process that identifies the criteria, frequency, and message given back to customers who have provided feedback to the organization (e.g. detractors receive a phone call from management within 24 hours)
- Understand and evaluate the key drivers that support the primary customer experience metric (e.g., loyalty index, customer satisfaction [CSAT], likely to recommend [LTR])
- Assist in the design of products and services for specific target audiences based on the voice of the customer and personas
- Create broader messaging that reports back to all customers what has been heard and what is being done to address it
- Align external communications with customer experience strategy

Organizational Design for VOC

First of all, it is not unusual to have this question or to start with a pilot program anywhere in the company. These 'grass roots' programs can gain a lot of steam and turn into full on CX teams. I generally see mature organizations putting teams together in the following ways for VOC specifically:

- Reports into CMO's or CCO's market research arm with small but tightly coordinated team
- Matrix VOC team with central program control in marketing or shared business process services dept. Usually there is a CX champion with a good amount of authority to align and direct several stakeholders on the matrix team.
- Centralized CX team under a CCO reporting near the CEO - handles all corporate, employee, and market (VOC) engagement.
- Matrix CX team under a CCO reporting near the CEO - same as above but resources are distributed into the divisions and only a few work directly under CCO to coordinate all activities.

I hope this gets your thoughts moving on the scope and span of what VOC can entail. I do agree with you that it seems like you're starting in a narrow manner, but that is actually pretty normal. Do what you can with it and pilot some of these ideas. As the program matures you will naturally start to

see where to take the program next. If you want to accelerate that I'd suggest creating or reviewing existing journey maps to understand your key moments of truth (KMOT).



**QUESTION
SUBMITTER**

Thank you for the direction. Lots to think about and process for a recommendation. Does anyone on the panel have experience with CX in a regulated product environment? Wondering how product complaints and adverse events are managed in relation to VOC programming in this arena, where governmental agencies globally have very strict handling/reporting requirements using customer feedback/case management.



**ANDREW
MCINNES**
CX Expert

You already got some great information from Peter (well done, sir). The same general principles and approaches apply in regulated industries, which I've experienced while helping build VOC programs at a few regulated utilities and big pharmaceutical companies.

There are some unique elements to these programs, naturally. One is liability and regulation around complaint handling and reporting, as you said. For example, one pharma client decided not to include open-ended comments in its transactional survey upon initial rollout because it didn't have a reliable process to route and review each comment to ensure no adverse events were reported (knowing comments can potentially slip by automated keyword and text analysis-based routing systems). They had to do some thorough investigation to define a process that passed legal muster. In another example, a large regulated utility decided to include its regulated complaint handling process in its initial VOC program rollout because complaints held so much rich data that could be better and more efficiently used within the new, consolidated VOC system. The bottom line is that these things definitely are and should be connected because they all offer useful, complementary information to guide the business. We've just approached them from different, narrower perspectives historically – with complaints and adverse events being legal and regulatory processes and other customer feedback being more research processes.

One other major thing I've seen prove valuable in highly regulated industries (and others) is the use of employee feedback as a proxy for customer feedback. Both the clients I referenced above give employees solicited and unsolicited opportunities to identify and address CX issues. This yields a ton of great insight without the legal and regulatory headache of direct customer feedback. It's not a replacement by any means, but it's a great supplement and something you might consider.



DIANE MAGERS
CX Expert

Peter gives some great detail and outline of how to build your VOC.

Also consider that customer intelligence from other sources is also part of how you can understand your customers. For example, the number of calls to a center, their activity online, call center reason codes, CRM, comments, spend etc. are all considered part of how you can build your program.

I think a slow and steady approach to gaining and using experience is wise. Using small pilots to test out action plans (generated from what you learn) provides good stories to tell about the impact of your changes to the experience. On that note, it's important to generate the customer and business results you are anticipating (and get baselines) and what impact was generated by the change. Enlist your finance team to help you build out a business case related to the changes you want to make based on customer feedback.

For co-creation and new product development, the Voice of Customer and employee - and even partners - (chiming in with Peter) is critical to get a comprehensive view of the needs and wants in the marketplace. Creating a way for customers to not only give you feedback but to have a two way

dialogue and conversation, to be part of a community and to contribute new ideas for products and services is about engaging them. CX professionals are finding new ways to create dialogue in addition to surveys.

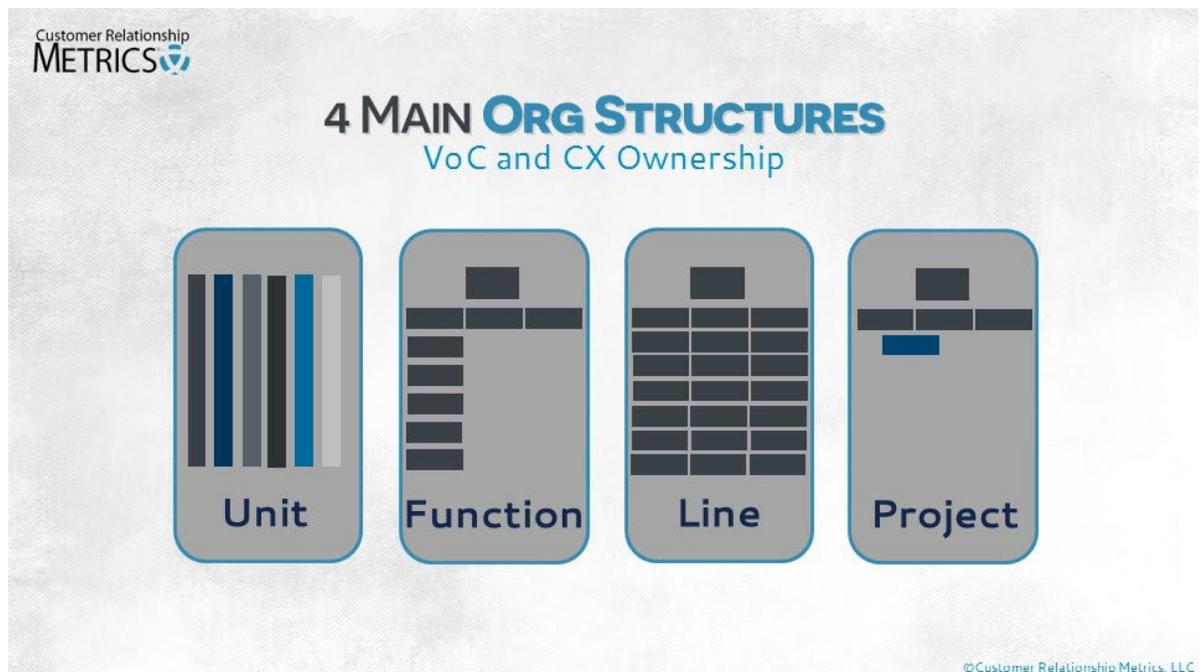
Peter gave great options for the org structure and I would add that executive sponsorship and the ability/agility to work cross organizationally are keys to success. Happy to provide more on those topics if you desire.



JIM REMBACH
CX Expert

The attached [below] shows the four most common configurations I have come across; that is more of a high-level visual of what Peter was mentioning. Know that most organizations have VOC programs that only get a brief mention at the c-level. It is not common place as a whole; but it is growing.

The CXPA, as a community, can give one a somewhat rosy image of what VOC and CX means in the open marketplace. The scope and responsibilities vary widely in these four structures. What I see is that most VOC and CX folks are better served learning how to thrive in the structure they have been given and not spend a lot of time in envy for a different model. But if you have the opportunity to recommend and model the structure...shoot for the very top!



QUESTION SUBMITTER

My thanks to all of you for the great input. I will be taking some time to digest it to determine what may fit in our world. There is plenty I don't know yet.

Jim – Do you have more information that would define the scope and responsibilities for VOC in the 4 structures you shared? I would like to confirm where we are today and identify if opportunities exist to align in a better structure for our future or at least understand my tradeoffs.



JIM REMBACH
CX Expert

Peter rocked it on the scope and responsibilities list. I've attached a slide that can help you map those.

Customer Relationship METRICS

WHERE TO AIM

Poised for ROI

- MOST WORK**
Where is the most work being conducted? For most contact centers, voice is the most expensive and highest volume interaction channel. If so, start here.
- MOST NEEDED**
Most valued customer segments may interact here. Most opportunity or customers at risk may also interact here. This is a secondary driver when budget constraints exist.
- MOST DEMANDED**
Executives, customers, competition, opportunity, and risk all influence the decision to measure. This is secondary driver when budget constraints exist.
- WHAT I CONTROL**
No influence, no control...no way. Avoid conducting VoC analysis on areas where you cannot implement change.

©Customer Relationship Metrics, LLC



KARL SHARICZ
CX Expert

You have an interesting challenge and one to which I can completely relate. Peter has provided an excellent synopsis with regard to scope, responsibilities and design and I'm hard pressed to add anything to that. My other CX Expert colleagues have added their perspectives as well.

Let me just say that in my previous corporate role as a CX practitioner, I had worked through many of the same challenges. And to a degree, we were in a regulated industry. Fire detection and suppression systems are code-driven and, to add to that challenge, code varied state by state. This was a pure B2B organization and interestingly enough we really never sought customer feedback on product quality or ease of use or any other dimension. Code largely determined how the product needed to perform, what color it could be, how it sounded, and where and how it had to be installed and used. These products typically sat idle and silent for most of their lives except when being tested or in an actual emergency, which was hopefully never.

Our VOC was primarily based on transactions in services such as installation, support, call-center handling, training, and billing. That was the initial scope and it eventually grew from there. I managed CX from a Marketing Strategies position it was my responsibility to sell CX both up and down the organization. I achieved organizational adoption (and funding support) from senior leadership through implementing the Net Promoter System along with dashboard reporting systems. I set up a closed-loop service response and recovery system with built-in accountability to ensure that any customer providing negative feedback had their issue at least addressed, if not resolved, quickly. I gained front-line adoption by segmenting the VOC to each specific local office and engaging both their management and support staff through annual workshops where they set the bar for improving their service delivery by creating action plans based on their customer feedback.

What I described above took me five years to get to the point where I could say there was general adoption and a regular rhythm built around CX. The next step was to close that larger and more

general loop that served as a transparency instrument to communicate back to all customers what some of those selected had to say about their experience. This came in the form of a Customer Experience Annual Report, designed for existing customers but which also served as a sales collateral instrument. Next came a bi-annual relationship survey that targeted the most key customers and then integrating those results with service operational metrics to indicate where correlations existed which further drove the point home about which moments of truth were responsible for driving customer satisfaction.

Everything I described so far was from the work from a small group of three CX professionals within a Marketing Strategies Group supported by senior leaders. I left that organization last October but last I heard the CX program and model was about to go global and responsibility for CX was finally raised up to a VP level which is essentially now what Peter described as:

- Matrix CX team under a CCO reporting near the CEO - same as above but resources are distributed into the divisions and only a few work directly under CCO to coordinate all activities.

So from simple and humble beginnings in 2004, this is a quick synopsis of what took a little over 10 years to achieve and reach this maturity level. And in some respects I can say that the job of CX in this instance still has a long way to go. As Peter has said this is quite a normal process, the more I hear from you and others like us that lived through (or are going through) a similar CX evolution. This is one of those elements of business where there are no shortcuts. If you'd like to connect at any time and discuss more details of the tools and resources I developed, please feel free to reach out and I'd be happy to chat with you.

Structure of a Customer Experience Team



QUESTION

I work for a postal service. The organization has been going through a huge transformation program. We are setting up a Customer Experience team and I was wondering if someone can suggest what the makeup of the team should look like. For example, number of people, roles, responsibilities etc.



ERICH DIETZ
CX Expert

Some quick clarifying questions before I offer up any suggestions:
What is the Customer Experience team being asked to accomplish? Is there a specific mandate that senior leadership has ordered? CX teams are typically architected different ways when trying to accomplishing different goals



QUESTION SUBMITTER

The postal service is looking for an agency to help design, engage, implement, test, improve and manage an effective, multichannel customer experience programme that differentiates the postal service and aligns to the business strategy & customer experience.

The project is to deliver on the following key elements:

- Drive engagement and alignment to customer promise amongst front line staff
- Develop a set of customer experience principles for use in on and offline environments. We need a particular emphasis on customer service across all our different channels (in branch, call centers, online web-chat) for use with all our different suppliers
- Develop an implementation framework to help us roll out the programme across the business and train our teams. Ensure the flexibility for us to keep the programme alive, despite staff turnover.
- Measurement and evaluation process for continuous improvement.



YVONNE NOMIZU
CX Expert

It sounds from your last email that you are specifically looking for outside help to develop the program as well as formulating your internal team. A few comments:

- **Who can Help?:** CX Experts are not allowed to recommend consultancies or sell themselves, so you will not get any referrals, at least from this forum. If you will be proceeding with an RFQ or a pre-RFQ exploration, however, there are a number of good resources within the CXPA community. Given the brief description below, I would suggest you look to partner with a group that has experience in public sector, because the background in what “business strategy” means, the relationship with front line staff, the legacy of traditional channels, the stakeholder network involved, the status of technology modernization, and approaches to performance measurement systems can be quite different with public sector/government entities and private sector. While you seem to be already operating as a “retail aggregator” focused on consumer

services, the front office/back office staff likely still have vestiges of “government service” in their identity.

- **Framing your Short Term and Long Term Challenge:** Having a customer-focused, engaged work force that acts consistently with your customer experience principles/brand is a great goal. The experts are asking you what specific outcomes you are after, because having a customer-centric work force is a great objective, but truthfully not really an end goal. If you had that engaged work force, what would happen? If that happened, what would that lead to? Why is that ultimate outcome important? You have a great opportunity to frame the CX initiative as a cultural shift but it will have more legs, anchors and “stickiness” if you also frame it with your senior management as a means to, say, improved service efficiency, which in terms means higher productivity. Some lead indicators, for example, might include: more postal service customers using online channels and being very satisfied with that experience; fewer complaint phone calls or second/third phone calls from same customer on same issue; less customer backlash on price increases (because they feel they really get good value from you – something utility companies are taking on), etc. I see in the press that lower costs and customer satisfaction are pillar goals within the Postal service Network optimization. My advice is to think about framing a short term challenge and framing a long term challenge. Framing means= presenting the adaptive challenge in a compelling way to all your different audiences so that all know that business-as-usual won’t work. Depending on what they are, it is often more effective to talk mostly about the short term and have the long term in the background (I know, usually people start with a vision... but 300 years of legacy, past links to the postal service, must be transformed in digestible chunks).
- **The Team:** Multi-channel is the operative word. The fact is that the person running call centers is trying to optimize call centers. The person developing online services is trying to optimize their functionality. You can start “messy” in that you put together an accountable cross-functional CX senior team and then charter a cross-function CX team to run the project. But, given the natural forces for people to come together in a conference room, then go back to their own areas and carry on as normal, my advice is to start by first getting alignment around a concrete multi-channel CX strategy. It would be based on data – customer feedback data, business data, operational, financial – and it would be strategic and forward looking. It looks like you have lots of funds (over 1 billion pounds) to keep the postal network intact, rather than shut down centers. But, customers increasingly want things self-service and online. To achieve business goals, to be competitive, to provide customer value, what is the mix of channels/services that customers want and the Postal service wants. Then, you can map the customer experience start to finish and find the intersection points. I have an example if you are interested.
- **Skill sets:** Do you already have a customer feedback system? If not, or it needs to be upgraded, you will need a team member who understands the details of data collection and analysis. If you’re early on this front you might need someone understands how to architect a whole customer experience measurement and improvement system – one in which employees are very involved (rather than a side office). Developing internal communication campaigns and training is another core competency that one person could lead. And, another key role may be design thinking/innovation facilitation. As you know the UK Design Council has some resources on this. Even if you are not chartered to actually lead customer experience redesign, customer immersion is a great way to engage employees. Also, if you want to differentiate versus other retail, CX design and retail design skills could be helpful. Lastly, the more you can have operational managers on your team – if not formally, at least very tightly aligned – the more chance you have of getting a heads up on where your vision of customer-centric employees will run into conflicting operational goals or franchisee goals. When I implemented

product and service changes within the 1300 Holiday Inn hotels, most of which were franchise, about 50% of what we asked for/defined/communicated/trained was actually done on the first round. Then I started to talk to more hotel owners and started to see the perspective of small business owners.

Hope some of this is helpful. It is indeed difficult to make suggestions without too much background. I did take a look at the postal service website and am impressed with the stated strategy and the fact that you are well funded. I know a researcher/writer who co-wrote a book with Christian Bason on public sector innovation and she may have access to some case studies that could provide you with some food for thought. Christian runs MindLab and focuses now on building citizen service and innovation capability for agencies in Denmark (see http://www.mind-lab.dk/en/about_mindlab/team/christian-bason).



QUESTION SUBMITTER

Wow, you have just blown me away with your knowledge and experience of this topic. I will spend time looking at each suggestion and create an action plan for me.

- Yes it's a great initiative and an exciting one for me to work on. You are right, we are in the process of looking for an agency to help design, engage, implement, test, improve and manage an effective, multichannel customer experience programme that differentiates the postal service and aligns to the business strategy & customer experience. As we are a public organisation it has to be by RFQ which in fact, went live yesterday. Therefore your guidance re partnering is really helpful, I will make a note of all those points during the selection process. The tendering process last six weeks. By 29th September we will have an external partner in place. Our aspirational launch date is 27th October to commence work on the project.
- We do have Voice of the customer programme but we need to do more work on it as we are having issues in getting the franchisee to buy in. Our network of 11,000 small franchises comprise of small local stores. They recruit and train their own staff, they sell other convenience goods. The postal service for them is not a major income generator but part of the mix. These are the people who thought they were providing a service for the Govt. and now we are asking them to own the customer and provide a better service and embrace the brand and deliver the customer promise. These are the people we have to win over. Requires a big culture and mind set shift. Would appreciate some suggestions here.

Re What specific outcomes are we after? At the moment the postal service has a sales culture. Until now, the postal service has been creating products for the business not the customer. The product design is about making profit by selling xxx. To address this we are creating a framework and a gateway through which all product design have to pass to be approved. The outcome we are looking for is to be the best Mails product provider in the country. Competition is tough as they are all providing competitive pricing and products so unless we act quickly we will lose our market share. But for customers to buy from us we have to get our house in order first. That is why we need to create a set of CX principles that the whole organisation can follow. This is big game change plan for the postal service.

We have gone through the exercise of finding brand purpose. Building on the levels of trust our consumers have with the brand and the 'expertise' our staff are perceived to have, we developed a new customer promise: **'postal service: Helping the important things in life happen'**. The way in which we deliver this customer promise is by making it easy for our customers to get these important things done.

This customer promise is now at the heart of our business strategy and needs to be delivered through every customer facing touchpoint and a number of projects are underway to do this

1. Communications – ‘We’re changing communications strategy – delivering proof points of how we are making it easier for our customers to get their important things done. E.g. longer opening hours, open on Sundays, online mails etc....
2. Products and Services – a new gated innovation process which mandates starting the proposition development process with a deep understanding of the customer need, market insight etc. as opposed to the current system of starting with the product.
3. Environments – a retail transformation project to look at how we can embrace digital technology and simplify the in branch experience, making it easier for customers to do business with us, so we can help them more easily make the important things happen.
4. Customer facing behaviors – This is the piece of work which is to be addressed by the CX project.

Re getting alignment around multichannel CX strategy, please do send me your example. The most difficult part of any initiative is the “How” so I am grateful for getting any help around this.

Thank you all very much for taking an interest in responding. It’s great to be part of community that has the expertise and is willing to provide guidance and support.

Customer Advisory Boards



QUESTION

I am building a customer experience program at my B2C organization, a health insurance company. I have been there one month in a newly created role.

Question #1: I have seen Customer Advisory Boards (for instance, in my last role) provide a successful forum for customer feedback as well as executive engagement. Would love your thoughts on the effectiveness of CAB's and, if you think they are useful, best practices.

Question #2: I have also seen executive customer calls be a powerful tool (again in previous roles) for keeping the customer front and center with executives and to provide feedback firsthand. Any thoughts and best practices here?



BOB AZMAN
CX Expert

Congrats on the new role! Always fun to go into a newly created role – so much opportunity! I've used both of these techniques for connecting with customers. Both can be very useful. In regards to CAB – I have found participants to be very willing to share their thoughts and guidance. I have found a few pitfalls.

1. Create a closed loop system – engage the members; seek their opinions; analyze their opinions as part of an overall VOC program and consider them as directional not the be all end all say in what guidance you are seeking. Then circle back with the board to let them know what you asked; what you found and what decisions you made on the topic. I have also found that a variety of people in the organization will want to talk with the boards – too casually and use their thoughts, and their thoughts alone to drive strategy. Not a good idea – and as I mentioned – only as part of an overall VOC program.
2. In regards to executive calls – I have utilized an exec sponsor program for many years – assigning key accounts with an exec sponsor. We provide a structured program for them to follow; and ensure they are well connected with the Account Executive so ensure consistent messaging from all parts of the company. I also have engaged them in contacting customers having difficulty with our products and services and those approaching renewal. It's important that they are well prepared and understand the background of the account and what we are trying to accomplish. "Dropping them in" isn't always the best idea – but rather creating a long-term relationship works best – at least in my experience.



LYNN HUNSAKER
CX Expert

I've come to appreciate the need for creating a full plan before launching into VOC. All too often, customers are consulted via surveys, advisory boards, etc. without a full plan about who should do what with the findings. And when those decisions are finally made, they're usually not as far-reaching as they could be, due to much energy being expended on fire-fighting, and attempts to assign the most pressing issues to the parties able to accommodate them, or to technologies as a fix.

Every organization already knows what most annoys or inhibits customers, before launching into VOC. Why not address those things with a full plan for engaging as many employees as possible in getting to the roots of those issues? Every employee, regardless of their title/function, wants to work for a company that is well-liked. We should capitalize on that, and find ways for every employee to see their work as having a ripple effect on customers' well-being. As long as correction of the roots of the known issues is made to be part of what managers' and employees' existing routines and responsibilities, you will see widespread change and improvement. Of course, it takes some cleverness to create a plan that does this. And it's well worth the effort.

You may appreciate an example from my own career in this article: <http://customerthink.com/strategic-action-on-b2b-voice-of-the-customer/> although it was written for a B2B audience, the pattern can apply to any type of organization: consumer, government, non-profit.

Further advice for starting/refining a customer experience initiative is in this series based on the theme “do this, not that” from the popular diet book: <https://clearactioncx.com/customer-experience-governance-do-this-not-that/>

What I learned from tracking CX practices for 4 years in a benchmarking study is that common practices are not always best practices. That was borne out via correlation analysis of practices versus business results. Customer experience improvement is the heart of CXM, and customer experience innovation is the #1 way to grow share of wallet and retention. Both require a high degree of employee enlightenment and engagement.



AIMEE LUCAS
CX Expert

Customer Advisory Boards

As Bob mentioned, get clear on the goals and objectives of the board and use that to guide your recruiting/selection process and when/how you engage. Be clear on your engagement plan with your executive stakeholders before you begin so that the organization understands the commitment it is making and to prevent future “hijacking” for things beyond its intended purpose.

Boards tend to be more successful when they strive to create mutual value for both the company and the members. For members, value may come from being able to offer their input and ideas, but also from being part of environment where they can learn and form connections with other members (particularly in the B2B setting). Use the board to look for insights that match the current business questions / challenges you want to infuse customer insights into and don't stop short of closing the loop with members on results and outcomes.

Executive Call/Listening Programs

As you state, these can definitely help raise customer empathy and keep the voice of customer top of mind for executives - whether it's periodically listening into calls in the center, reviewing a call recording at the start of executive meetings, or doing outbound calling or joint customer visits themselves. One opportunity to not overlook is the powerful example this be to the rest of the organization. Encourage participating executives to share their experiences/takeaways from this program in their communications (emails, blogs, in-person meetings) across the company, tying it back to the company's overall customer experience strategy and goals.

Employee NPS (ENPS)



QUESTION

I am the VP of Client Engagement at an insurance company and we utilize NPS as a way to measure client satisfaction and loyalty. Our Human Resource department is wondering if ENPS might be something to consider adding to our current engagement survey and a possible option for taking the pulse of employees in between the larger engagement surveys which we administer every 24 months.

Do any of you have experience with ENPS and could provide me with the pros and cons? Any good resources for ENPS you are aware of and/or a company utilizing it that might be willing to talk to us? Would appreciate any information you have.



JIM REMBACH
CX Expert

Back in 2001 when I went through my Employee Retention Specialist certification I became more formally aware of the traditional employee retention and HR practices associated with engagement. Since then a lot has changed as more scientific study, workforce demographics, and the increase of the knowledge-worker society has emerged. All of what I am mentioning here is what constitutes the cons associated with ENPS (and other ESAT measures). The way it was done (and what is still common) is not what is needed in the modern workplace.

If NPS is the methodology you want to use, then ENPS must be made into a Pro. ENPS should be a dependent variable in your ENPS measurement program. So it's the independent variables that really need to become the primary focus of, "what to do?" Unfortunately, many focus their independent data collection on the external drivers of ENPS which most often leaves them in a state of frustration.

One important thing to note is that if you want to do more than merely measure ENPS this is not where you would want to focus your research. The best work being done with employee engagement and retention is not labeled "ENPS". I would offer up to explore more in the emotional intelligence (EQ) arena.



QUESTION SUBMITTER

Thanks for the quick response- I'm definitely not the employee engagement expert here but we have quite a bit of rigor around evaluating engagement and I believe we utilize some fairly new methods. They aren't considering ENPS as a comprehensive solution but rather as a possible addition and/or pulse metric. I think it has been suggested as something to research because of our client NPS program. That has been widely adopted- it's not all we do and we aren't purists but it's probably the best understood, accepted, and talked about. At any rate if you or any of the other CX Experts have experience with ENPS, know of any companies using it or case studies available I'd appreciate you pointing me in the right direction.



YVONNE NOMIZU
CX Expert

If you already have an employee engagement study that is measuring the right things (the factors that employees themselves say they care about), and you want to take a pulse for the purpose of seeing if there is an issue, then use the same umbrella measure you use in the engagement study. Then, you can say if sentiment is up or down.

I am with Jim in that Net Promoter Score just doesn't fit everywhere, and even when it applies (e.g., yes, I would refer a bank to a friend versus yes, I would refer Oracle support to a friend), it is not set up to tell you 1) where to focus and 2) what's really going on motivationally with employees (Jim's point).



JIM REMBACH
CX Expert

It appears that you are mainly looking for others that are NPS shops that have made the linkage; because some of the things you mention actually provide clues into the potential presence of gaps in strategy and culture that may result in unintentional consequence that inhibit continuous improvement.

I would suggest posing your question on NPS specific forums (LinkedIn, Google+, Bain & Company). Your chance of finding more to speak with is greater. The clients I am working with on this are at the early stages of alignment and you are probably ahead of them in the journey.

Metrics for Call-Centers



QUESTION

I'm looking for specific examples around metrics used by call centers. My team and I are quite aware of NPS, but we are looking for other metrics and measurement that you may have seen implemented by other companies.



ERICH DIETZ
CX Expert

Below are some quick examples of metrics we see clients use in contact center customer service environments for agent efficiency (input) and customer perception (output). Each has a story, and a deeper description of how/why they are used (in conjunction with one another and in isolation), but these are some quick starting points:

Outcome Metrics

- First-call resolution – walk into 10 different call centers, you will hear 10 different formulas for how this is measured... but at a minimum we recommend the formula contain customer perception, and time-based operational data
- Second-call resolution - this has been very interesting to watch, especially as clients use it to drive front-end routing strategies as well
- First-contact resolution – the customers perception of the # of contacts to resolution, inclusive of calls, email, store visits, web visits, etc.... basically, this includes any interaction with any touch point in their effort to resolve
- Customer effort – We recommend something along the lines of “indicated your level of satisfaction with the level of effort you put forth”
- NPS, CSAT, CLI, CXPI, etc.... (at the brand, touch point, and agent level)
- Dissatisfaction - a measurement, and trend on bottom, or bottom 2 box on a sat scale (at the brand, touch point, and agent level)
- In several industries that have large CC operations, Dissatisfaction continues to have the highest correlation to business outcomes (ex. customer churn, repeat calls, etc.)

Agent Efficiency/Input

- Average speed of answer – we strongly suggest this is measured/monitored in tandem with customer feedback/satisfaction to ensure a CC is not over, or under, staffed based on the divergence of the metrics
- Talk time
- After-call wrap time
- Schedule adherence
- Time based measurements on time per desktop application per interaction
- Calls/per hour
- Repeats
- Nothing whiz-bang here... we still see a lot of the same old metrics

Also, given that not all calls are created equal, we strongly advise that all of these metrics are measure and monitored at a queue/type level, along with any other customer or employee profile data you have access to:

- Customer segment
- Customer tenure
- Products
- Agent tenure & other agent demographic data
- Customer geography
- Service Delivery geography
- In-house vs. outsource

There is definitely a great movement going on that is shifting the focus from input, to output metrics: to customer effort and/or satisfaction measures, versus a focus on metrics like talk time.



JIM REMBACH
CX Expert

Metrics is a loaded gun for contact centers. They are loaded with them and unleash a Howitzer barrage of them at any time. When I managed in contact centers we did look at many of the metrics already shared with you (and many more). Many metrics are for the operations (traffic team), WFM (workforce management) and various other stakeholders. And some I would recommend people stop or never use. For example Service Level is a very important metric and should always be used before Average Speed of Answer (ASA), yet many still use ASA when Service Level could be made available.

I advise many clients on their contact center metrics and have a reference that has over 150 metrics included in it. But here is a very common (and important) unknown. Many of the calculations for contact center metrics are calculated differently based on the technology developer and the preferences that may be programmed by the users. So comparisons are often ill-advised.

This is a massive topic, so let me share this. The company I work for was founded at Purdue University and we have a commitment to the academic community. If I can help you to hone in on specifics or connect you with other academics focused on contact centers, please let me know.

Experience Design



QUESTION

I am seeking guidance on designing a specific element of the retail customer experience. Imagine you had access to the most advanced new POS system in the world and you were asked to design a truly differentiated check out experience. What questions would you ask? What process would you recommend I follow?



CAROL BUEHRENS
CX Expert

Talk to customers. Besides obvious product questions, I typically dive into questions about the customer's lifestyle, what do they love to do, their interests and other things that could influence ideas. How this will fit into their daily routine, what motivates them. Of course, the overall journey – What are they normally doing prior to this touchpoint – what did they learn from that – what are they doing after the experience with the POS. If there are any expectations after, or additional call-to-actions. I definitely get into emotions – how did the customer reach this emotion – the ideal conversion emotion - how they should feel after. I always want to know, if they could wave their magic wand (no boundaries), what would they ask to have in this experience/product/service? What would be outrageously surprising to them? I try to get some zany stuff.

Then I typically dive into User Experience question, such as what systems they frequently use, what would make it easy, what they like/love/hate about these types of systems, etc. Their pet peeves, etc.



JIM REMBACH
CX Expert

There are two frameworks that I am working with now that are being validated by the body of work that is being conducted in brain science. I am using the Emotional Intelligence framework and the Appreciative Inquiry frameworks. Combining elements from both of these based on the client condition permits the ability to more rapidly converge intent and action in a positive manner.

My initial questions typically enable clarity in the areas of congruence. For example, I would construct a question using their terms to identify any gaps between them wanting a differentiated and expectations of investment, time, human impact, change effort, and ROI, etc.



LYNN HUNSAKER
CX Expert

I'd say the key to it lies in the question "what are shoppers trying to get done?" Typically, shoppers have either had a cursory or enjoyable experience selecting goods. Once selected, they're eager to get on their way to using the goods. So typical checkout scenarios are an interruption, a necessary evil so-to-speak that we've learned to tolerate. As such, the ultimate checkout experience might be an automated electronic scanning of goods as the shopper passes a certain point, and a very succinct acknowledgement and payment process automated such that interruption is at an absolute minimum.

For certain shopping scenarios it's actually a value-add to have a dialogue with the store representative before finalizing payment. So it would be important to right-fit the checkout to the scenario, and even allow shoppers to choose case-by-case.

In researching this I'd be inclined to ask shoppers: "what are you trying to do through this purchase" and "what in your wildest dreams would help you most" and "in a perfect world, what would you

be able to do". There's a lot of innovative value in the "jobs-to-be-done" concept, which I believe should be a primary segmentation criteria and the guiding light for all that a supplier company does.



DIANE MAGERS
CX Expert

Design thinking and innovation techniques often help when discovering the needs (expressed and unexpressed) of customers. Check out the resources at LUMA institute and IDEO. You will find some innovate techniques to think about the human experience.

I always start with the basic questions of "what is the emotional need and the moment need" when beginning a design project. After teasing out those needs and wants (through ethnographic, research, focus groups etc.) try applying several innovative thinking techniques (see above). Also, what are the goals of the business? How does the experience relate to their brand (quick, comfort, concierge, warehouse feel? That will all contribute to design and how you match the expectations, needs and wants of both. Also, it's important to think about innovation adoption (rates of adoption by different segments or groups of customers). Needs based segmentation might also be a good study for this project.

Considerations: How will you capitalize on the data and information you have? What will engage the customer at the checkout experience? How will the interaction be made simple and effortless from a time and effort standpoint? How will it enable them? How will you integrate the pre-store, in-store, transactional and post-sale goals? How can you promote discovery and continuation of the sale at home or on the go? What are the related and supporting actors in the experience (e.g. packaging, bar codes, digital pay, color, lighting, music) and what part could they play. How will you consider the regulatory, commercial, aesthetics, functional, human and financial drivers within your design?

Customer Effort Score



QUESTION

I want to start asking the customer effort question and I am looking for the best way to ask this question. I currently have this. How much effort did you personally have to put forth to handle your request with us? [0 "not worth it" to 10 being "well worth it"]



JOHN CARROLL
CX Expert

Without knowing the details of the purpose and process of your implementing Customer Effort Score we would suggest you consider applying the tool closely in line with the original and evolved thinking of the originators of the concept – Matthew Dixon, Karen Freeman, Nicholas Toman, in their 2010 Harvard Business Review article "Stop Trying to Delight Your Customers". There are details in the article and while your question language looks on the mark, the authors have suggested a 5 points scale with end anchors of (1) Very Low Effort and (5) Very High Effort.



ERICH DIETZ
CX Expert

My quick, humble opinion is that it should be asked from the perspective of satisfaction.

As a simple example:

"How satisfied are you with the level of effort you had to put forth to get your issue/question resolved?"

Simply asking Level of effort (high to low) does not account for one of the main desired outcomes; the customer actually being satisfied with the interaction.

In many instances a high level of effort typically corresponds to a low satisfaction rating (as well as the converse), however there are instances where that does not hold true... some examples:

- Tech support calls can be a high level of effort, but in some cases customers are satisfied with that because it matches their expectations.
- Buying a car is the same... it can be perceived as a high level of effort, but that can be 'ok' in the eyes of the customer

In general, we have derived the most value from the level of effort question by asking it in this way with our clients (from the perspective of satisfaction). There is a lot more that goes into the decision of how to ask the question, and why, but this is just my opinion if I have to paint with very broad brush strokes.

Additionally, if IVR is one of your data collection methods, I would not suggest going beyond a 5-point scale.



YVONNE NOMIZU
CX Expert

Agree with John that the original question captures the concept of effort in a more straightforward way, with the caveat that I have not seen any validation results per se. The "worth it" versus "not worth it" captures two dimensions – what I put into it and what I get out of it. This ROI-like measure might seem useful, but generally you don't want to integrate two questions into one on a survey questionnaire.

This is obvious, but you would of course want to make sure the respondent knows what is meant by "it" – the interaction/experience the person is rating. With effort... the customer tends to think about the effort associated with achieving his/her goal, versus a single interaction. And, that is a

good way for you to learn what to change. So, for example, what was the effort associated with “making a change to the benefits plan selection” would be a customer goal-oriented scope, whereas what was the effort associated with “submitting a new choice on line” is more of a transaction on a particular channel. The second is much narrower.



TABITHA DUNN
CX Expert

All great feedback that you have so far. I would add that in my experience, “resolve” might be a better word than “handle” because it speaks to the end goal, which is having the problem resolved.

Customer Health Score



QUESTION

I'm working on a project to develop an overall customer delight/health score. The idea is to use a variety of metrics to measure how we are delivering customer experience across various functions tracked back to individual accounts. We are considering a combination of NPS score to measure overall loyalty, CES score to measure our customer service, SLA failure to measure delivery of our end product, and customer communications engagement to measure the relevance of our marketing content. We would then track this back to the individual account and endeavor to create an overall account health score. These scores would be individually weighted to create a combined score.

1. Have you successfully created a customer health score based on customer experience metrics? What metrics have you successfully incorporated?
2. Where an NPS survey wasn't completed, how would you "score" that individual customer? Any advice would be greatly appreciated!



SARAH SIMON
CX Expert

I'll start by providing some high level thoughts:

Have you considered including "likelihood to repurchase/renew within # months"? How are you going to leverage the results? What is your action plan in response to scores? Are high-value or high growth potential accounts to be handled with greater urgency?



JIM REMBACH
CX Expert

Last week I spoke in front of a few executives at the Conference Board and all of them were unanimous on three things.

1. We have too much data and don't know what to do with it.
2. We are not sure we are measuring the right thing.
3. We are not sure what we need to measure.

I share this because many of them have done what you are attempting. And you are going to get an ocean full of advice sending you forth. So for me, my advice would be three things before you get swept out to sea:

1. Know your purpose better. (creating happy customers and shareholders is not it)
2. Know the emotion in the touches from all angles (front, back, inside, outside)
3. Try to use what you already have (you have strengths that got you this far).

These three things should be a beacon to help guide your way.



JOHN CARROLL
CX Expert

Reacting to the score creation aspects of your comments and questions -

We don't advise creating an index of a variety of metrics because the compounding sources of statistical error tend to leave it impossible to detect any real change over time. Weighting compounds these issues. The net human behavior impact of creating and reporting such a combined weighted score is to immediately ask to break down the metric back into parts to understand why something might have moved which removes the purpose for the overall health score.

While perhaps not good news – hope this helps!



**ANNETTE
GLENEICKI**
CX Expert

I'll echo some of the thoughts that have already been noted...

- I'm not a fan of a composite/index. It just muddies the water and doesn't give you clarity into what you're really measuring.
- What are your desired business outcomes? Perhaps that will better help you select a metric.

And it probably goes without saying that it's less about the metric than it is about what you do with the feedback to improve the experience.



**LYNN
HUNSAKER**
CX Expert

I think it's great that you're monitoring several dimensions of customer experience management. In the quest for simplicity these days, we sometimes silo-ize CXM from the start. Here's an article that may be helpful in making your monitoring manageable for your stakeholders by organizing the hierarchy and display of your metrics in a meaningful way.

<http://community.cpa.org/blogs/lynn-hunsaker/2014/11/18/metrics-for-customer-experience-management>



**YVONNE
NOMIZU**
CX Expert

Agree with Jim and John that composite scores will probably give you less reliable information than a single score because who knows whether your weighting is meaningful, 90% valid X 90% valid = 81% valid, and tracking back to root causes will be that much more difficult. I'm wondering if your thinking comes from not believing in one single measure. None is perfect. Each and every measure has its positioning in the marketplace that makes managers think there is a specific niche it is filling. But the niches are just the effective marketing by the people who like their particular measure, or academic bias! NPS/Bain/Satmetrix was brilliant in getting people to believe it is the "one measure." Then, the next one comes along. Almost like people struggling with different economic theories, e.g., supply side versus demand side and deciding to combine them all into a master, weighted framework in order to incorporate it all.

My recommendation:

- **Trust** that a good survey (well written questions, questions that derive from the customer's values and needs versus an internal perspective, length/mode to achieve representative sample) with a capstone satisfaction question will work. Note that "SLA failure to measure delivery of our end product" is an INTERNAL measure. You probably hold a group accountable for meeting SLA targets. Those targets may be important for performance management and probably relate to what drives customer satisfaction, but still these fit under "internal perspective." The capstone customer satisfaction measure is ONE of the several viable measures out there. Which one? NPS is definitely not appropriate for many businesses. Very few people would recommend United Airlines to their grandmother, but huge numbers are loyal because of their Mileage-Plus program. This is key to United's business model at least right now because getting the workforce to deliver phenomenal service is just not feasible, and they know that schedule and perks are major drivers of behavior. How to figure out which? Think about your own business model and which measure is logical and easiest for you to link to your bottom line.
- Do the **right kind of analysis** that helps you figure out what is most important to fix that would have the most impact on that customer satisfaction measure. Regression analysis is one method. We created Net Impression® leverage analysis to determine highest leverage CX efforts. Other research firms have other approaches.

- Spend 20% of your time creating a **credible, simple metric** system going at the highest level. Credible = links to the start to finish customer experience on those areas that are most important to your primary customer segments. Spend 30% of your time **engaging** the leaders (those who control the resources that can change process, communications, priorities, staffing, skills that make a difference in CX) in the measurement system and let them add questions/measures if it helps them relate, or helps them understand their particular area's impact on CX better. Spend 50% of your time trying to **spur change**, e.g., facilitating the discussions about "so what" coming out of the data, showing progress via metrics/customer recordings/analysis of support calls/social media to serve as positive reinforcement, etc.

In terms of a customer not completing the NPS survey, you need to make sure you have representative sample, so that the overall findings represent your customer base and are actionable. Getting representative sample is a science and art, with best practice methodology for knowing what is the proper mix, using sample recruiting techniques to get as close to the mix as possible, and then using weighting in the data to build to representative buckets. In fact, that is one of the problems with NPS – the desire to make sure every customer can be labelled as a promoter or detractor. Would recommend that you rely on the overall measure to know how well you are building "promoters" and find other mechanisms for detecting "detractors" – indicators coming from support calls or Twitter, or predictive analytics where you can identify early indicators of defection (what they are depends on your business, the Customer Journey, etc.).



**QUESTION
SUBMITTER**

Definitely a lot of food for thought. I think Yvonne hit the nail on the head, not trusting in one metric. We've been using NPS for some time now, but I guess my issue with it is that it doesn't tell us enough about where the gaps are. Yet, its beauty is in its simplicity - just the one question (of course we do have a follow up free text question as well)

Would you suggest a more robust survey? I guess one main concern would be lower response rates as a result of a longer survey. We would be looking to use the results as a predictor of churn so we could reach out to accounts proactively. I also love Sarah's idea of the question "likelihood to repurchase/renew within # months" Thank you all again for sharing your advice and insights.



JIM REMBACH
CX Expert

The lack trust was crippling those executives. I introduced a tool (to them) to assist in beginning to build some trust because lack of trust is most often the hidden villain in the "no action taken" problem that so many experience. Know that lack of trust is not just in data. But not trusting your data only exacerbates the problem. You can find the CX Inventory Tool at <http://www.metrics.net/get-trust-in-voc/>



KARL SHARICZ
CX Expert

At my former company, we used what's called the Secure Customer Index (SCI) which is an index of three survey questions—(1) overall satisfaction, (2) likelihood to continue doing business and (3) likelihood to recommend. All three questions were part of a 22-question survey and these were the **first three questions** on the survey, **were mandatory** questions, and used the **0 through 10 scale**. NPS was our primary CX metric for reporting but we used the SCI value to trigger our alert responses. You could give a neutral (7 or 8) for example on the recommend question but if the other two were lower that would result in a lower index and hence trigger an alert.

Accordingly we did not report the SCI metric as a specific CX measure—it served only as an alert trigger. However, we did find it useful when segmenting customer data such as key accounts or

specific vertical markets or specific product categories. There's nothing inherently wrong with having a combined metric as long as you know what you're doing with it. Like NPS or CES or any other key metric you use to report, the power is not in the metric but what's driving the metric and quantitative measures alone can't tell you that. No matter what the score, you need qualitative data in order to derive insights and drive change. And if you have a lot of qualitative data you probably need to use text analytics.

Social Media Impact on CX



QUESTION

I'm trying to present the case to obtain stronger resourcing to respond to & manage customer issues on Facebook, twitter etc. Our presence on social media is as yet still quite new as we are only active circa 6 months on social media as a company and thus very much in the early learning stages. We recently had a case over the holiday season where a customer raised an issue that was not dealt with effectively by the organisation i.e. not dealt with immediately and not recognised quickly enough as being something that would be shared. To that end we are re-evaluating our alert process, & resourcing in particular around out of hours customer issues which arise on social media.

In order to get the resources/commitment behind it I need to demonstrate that such negative sentiment undealt with can impact sales within a financial services environment. We have undertaken a full review of the shares, responses etc. & everything is now resolved satisfactorily with all customers involved.

However, going forward we are trying to make the case to the organisation to help us resource such incidents, escalation path for out of hours (both departmental and seniority) beyond the Call Center & Marketing and the wider recognition/participation by the organisation that not dealing with a poor customer service issue as quickly as possible when raised online has wider customer experience impact.

Would you have any stats or benchmarks/case studies available I could use to help make the case?



SARAH SIMON
CX Expert

I'm afraid I don't have any hard/fast numbers to support your effort. No company can afford to be a social media deadbeat. The price paid for having a corporate social media presence is the necessity of responding to client/market/prospect inquiries/complaints/comments. Frankly, it's better to be absent from social media than to be an online deadbeat.

I hope it is ok with the CXPA that I share a link to a post written previously. (If not, then smack me on the wrist and I won't do it again.) Although this post specifically addresses small and midsize businesses, the advice it contains are applicable to any size company at risk of being a social media deadbeat:

<http://www.cx-journey.com/2013/01/smbs-dont-be-social-media-deadbeats.html>

Take a look at the social media profiles I outline and consider whether your company currently fits one of these personas. **TRUST** is such a crucial part of a financial institution's relationship with the customer. You cannot afford to appear untrustworthy in social media (or anywhere else for that matter). Trustworthiness, integrity, honesty, sincerity – these traits must be on display at all times by bank/insurance firm, especially when the whole world is watching!



KARL SHARICZ
CX Expert

I'm in the same mind-set as Sarah and with no hard and fast data to support this, but it should go without saying that "to ask and or to hear customer feedback but have no real and immediate response mechanism built around it" can do more damage than never asking in the first place. It's like saying "we welcome your feedback but we're not planning to do anything as a result." I was with an organization that jumped on the social media bandwagon for promotional purposes and because it seemed like the popular thing to do, yet they had NO infrastructure built around responding to customer complaints arriving through that channel. Sheer lunacy in my opinion. They were very fast to join the social media deadbeat club. I think many of my CX colleagues would agree that regardless of channel, once you commit to receiving customer feedback, you should also be committed to responding in kind. To not do so is a waste of time and money and can do more net

harm than good. This would be the yin without the yang. It just doesn't work and the real underlying message is "we care somewhat; we just don't care that much." Bad karma!!



BOB AZMAN
CX Expert

Several years ago as the social media craze was exploding, I would wake up in the middle of night from nightmares of twitter comments gone wild that would disparage our brand and be the demise of our business. We tried to apply a response process for phone calls or emails to social media and it didn't work. At the time, in order to respond to one twitter comment – I needed executive; legal; corporate communications and marketing approvals. That would take as many as 7 days and most often resulted in such an edited response that it was not only past due but useless as well. And these were not major issues – most frequently they were minor service issues that could be easily resolved.

Knowing little about twitter, Facebook and the like, I asked my leadership team to give me 5 names of staff members who knew this "stuff" and would be willing to figure this all out. The 5 names came forward quickly and I charged these millennials with formulating a response process for our social media interactions. They did in short order; we ran it up all the necessary flagpoles for approvals and gave them and only them the authority and responsibility to respond to comments, etc. They took their roles very seriously – used internal resources when needed (who were charged with responding to their inquiries within an hour); asked leadership opinions when in doubt and satisfied our customers. The process they developed ended up contributing mightily to the \$13B Corporation's overall social media policy and resulted in many, many timely responses that were well thought out and on only one occasion was questioned by someone in the legal department. It didn't take a lot of money but it did take me convincing 5 people to go the extra mile above and beyond their existing responsibilities.

While there aren't a lot of benchmarks – there are plenty of examples of social media gone awry – in fact they happen almost every day – and I always said – I NEVER want our company to be a you tube sensation unless we orchestrated it or it was favorable to our brand.

IMHO – and in my consulting engagements; classrooms and talks, I emphasize the need for every company to have a social media response mechanism in place. And don't forget – an internal social media policy is important too. What employees choose to post about the company on Facebook or twitter could be unknowingly (at least we hope so) violating company policies.



QUESTION SUBMITTER

Many thanks for responding. We do have a response effort in place but unfortunately for social media it just is not timely enough although more than meets the Consumer Protection Code here. I like the idea of a hit squad seems like this might be the easiest route & most effective to put in place - as I say we are still learning so welcome the inputs



DIANE MAGERS
CX Expert

Good morning! Great responses from my peers. The companies I have work for and with have had the same approach. We developed a listening and conversation strategy around social media. Our main goal was to promote conversations, both good and bad, about what was happening. We, too, set up a team to handle social media and include them as part of our entire Customer Conversation process... looking at trends, root cause, sentiment, word of mouth impact, and driving change in the organization. A key part of success is continuing the conversation by letting customers know we heard them and have fixes or resolutions launched. It's a fine balance.

With regards to the business case, it is certainly easier now with some social media tools (see first article link below) than it was. Many of the VOC and CRM platforms provide rich data and information on social media, so absolutely see if your current infrastructure has (or can have) the capability to weave this into your CX strategy.

Intro:

<http://www.marketingprofs.com/articles/2015/26754/the-no-1-social-media-mistake-youre-making-and-four-ways-to-fix-it?adref=nl010815>

I found a lot of good resources and information to build our “story” about social media and its impact. They do a good job of helping you to formulate the business case.

http://www.slideshare.net/Synthesio/put-a-social-media-lens-on-customer-experience?qid=614f85ed-0e1d-4cdc-8aa2-5195bad4cfde&v=default&b=&from_search=10

<http://www.slideshare.net/Synthesio/webinar-the-business-of-social-intelligence-33324968?related=1>

Asking Partners (Resellers) for NPS



QUESTION

I am starting a net promoter program at my company. Our product is sold through partners (resellers). Looking for advice when surveying partners vs. end customers. In my past I have run NPS programs at companies where we sold via retail. So we surveyed just the end customer. Pretty straight forward. My plan now is to survey end customers as well as the partners who sell our product. I'm looking for advice on NPS as it relates this model.



JACK MACKAY
CX Expert

Before surveying end-users, you'll need to educate the resellers on the NPS system and how increasing Promoters and reducing Detractors will benefit resellers financially and help accelerate their growth. Then you'll need to share the incoming end-user feedback with your resellers and set expectations regarding how to act on the customer feedback. If you are going to expect them to close the loop with customers who are dissatisfied with the product, that will take some discussion. If you are going to close the loop from your office, or have a shared effort, that also needs to be clear. One other step I'd recommend is to share benchmark NPS data across your reseller network, together with best practices from the top performers on NPS. This gives everyone a sense of what is actually possible as well as how the end-user customer experience they deliver compares with their peers.

When surveying the resellers themselves about their intent to recommend and their reasons why or why not, that creates an expectation that your organization will genuinely listen to the feedback and take action to improve relationships with resellers. My motto is: If you are not willing to act, don't ask. Otherwise you just create cynicism and apathy the next time you ask for feedback. You'll want to communicate what your priorities for improvement are to your reseller community along with some concrete steps you are taking right now. Just scratching the surface here as this is an ongoing process.



QUESTION SUBMITTER

I agree with your comment about acting. My goal is to put a NPS closed loop system in place. Not an NPS survey. I was planning on surveying our end customers at the same time as our partners. It sounds like you would recommend splitting that up and getting educating the partners before surveying the end customers. Also, how do you think about modifying (or not) the NPS question for partners?



JACK MACKAY
CX Expert

I do think it's a good idea to put some time between asking partners and end-users for feedback. Otherwise you get overwhelmed with input and won't be able to take the kind of focused action that makes the whole effort worthwhile.

It sounds like you don't have any type of VOC (or voice of the partner) process in place now. So think about starting the educational process by first creating awareness about the business impact of customer loyalty and advocacy. Share examples of business results that admired companies have achieved. (It would make sense if these companies use NPS.) Next, invite your colleagues to join an internal team to study how you can use the customer experience to differentiate from competitors and accelerate growth. It's much better to get a small core of internal champions onboard and

taking some ownership of the NPS initiative than to be the only voice trying to create change. Again drawing on my franchise experience, the NPS question for partners would not require much modification: "How likely are you to recommend {company} as a business partner?"



**QUESTION
SUBMITTER**

Again, helpful. I've never used this aspect of CXPA, and I really like it. I'm glad there is the 'ask the expert' capability. I agree with your comments about the champions. I'm already down that path. And the good news is that this has a ton of tops down support. But not everyone here is familiar with NP...so as you can imagine, I spend a lot of my day educating folks!

I have one more question for you. I am currently working through how many partners I should send the first survey to and could use some advice. The first survey is scheduled to go out in January, with the 2nd survey likely coming six months later. I am wondering if I should survey a sample of my population or the entire population. I am leaning towards surveying the entire population as a baseline. And then a sample every survey after that. I'd love to hear what you think.



JACK MACKEY
CX Expert

I think you're right. My first thought is to ask all your partners. One metric you'll gain a baseline on will be response rate. But it will be crucial that you close the loop with respondents.

Expert Bios



Bob Azman

*CCXP, Chief Experience Officer
Avtex Consulting Solutions, LLC*

Bob Azman, Chief Experience Officer, consults with companies in a variety of industries on developing and implementing strategies to improve their overall customer experience and service operations. Twenty of his thirty five years in business are in service operations leadership roles that have prepared him well for his role at Avtex. As a thought leader, practitioner and business partner in customer experience design and execution, he provides a unique perspective on helping companies become easy to do business with.

Bob also brings a wealth of diverse, general operations and business background as an executive at large corporations such as Thomson Reuters, Ceridian and Deluxe Corporation. He has managed global customer service and technical support organizations as well as software implementation and training and development functions in the US, the Philippines, India, South America, Australia, Japan and Europe.

Bob earned both his MBA and bachelor's degrees from the University of St. Thomas in St. Paul, MN. He is an Adjunct Professor in the University Of Minnesota Carlson School Of Management's Supply Chain and Operations Management department teaching Service Operations Management at the undergraduate and MBA levels. He is also a guest lecturer in the executive MBA program at the University Of St. Thomas Opus School Of Business. He is a frequent speaker on the subject of developing effective customer experience and service strategies at industry forums and conferences where he receives top ratings on his interactive approach and unique ability to combine academic principles with real life experiences. Bob is also a certified University of Minnesota Master Gardener.



Carol Buehrens

*Chief Architect Customer Experience
ICW Group Insurance Companies*

With over 25 years of Customer Experience design, marketing, and product management expertise, Carol has a passion for creating end-to-end "WOW" experiences.

Carol leads the Customer Experience strategy for ICW Group Insurance Companies, a winner of the CXPA "2012 CX Innovation Award." Before joining ICW Group, she held leadership positions at several major companies, including Liberty Mutual, Northrop, McDonnell-Douglas, Bechtel, General Electric, and Mercury Marine. With a background in instructional and interface design, Carol has authored over 20 books through McGraw-Hill and multiple software vendors. Carol is also a visiting adjunct professor for California State University, Fullerton.



John Carroll III

*CCXP, Global Head of Clients
Ipsos Loyalty*

John Carroll III, CCXP, is the Head of Customer Experience for Ipsos Loyalty, the world's leading customer experience, satisfaction and loyalty research and advisory firm with revenue of over \$340 million and expert staff in excess of 1,200 located in over 40 countries. As the Head of Customer Experience, John is responsible for practice development and growth including designing and delivering customer centric transformational change programs with iconic brands and customer experience leaders such as IKEA, Walgreen's, FedEx, Intercontinental Hotels Group, Shell, and the US Postal Service.

John regularly speaks at major conferences, publishes thought leadership, and is interviewed by the media for expert guidance on all matters relating to customer experience, satisfaction and loyalty with special emphasis on Enterprise Feedback Management and Practical Big Data. SURVEY Magazine named John a Technology Future Leader and John has regularly co-presented with leading customer experience software companies including Medallia, InMoment, and MaritzCX.

Currently based in Chicago, John is a dual citizen of the United States and Ireland has lived and worked in Europe, Asia, and Africa for a total of over 10 years. In the past 18 months alone he has served clients in over a dozen countries including Chile, China, India, Singapore, Japan, New Zealand, United Arab Emirates, U.S., and the U.K.

Prior to Ipsos which he joined in 2003, John gained a broad range of experience helping organizations resolve critical strategic issues while working at McKinsey & Company and Deloitte. John earned an MBA with distinction from the Kellogg School of Management at Northwestern University and a Bachelor of Science in Foreign Service from Georgetown University with certificates in International Business Diplomacy and African Studies. He continues to act as an admissions interviewer for both schools.



Erich Dietz
VP, Business Solutions
InMoment

Erich Dietz is the Vice President of Business Solutions for InMoment. He has over 15 years of executive experience spanning consulting, business development, and solutions architecture. Erich joined InMoment in 2003 and primarily works with InMoment's large, complex client organizations within their B2B, B2B2C, and B2C markets. Erich partners with clients to architect and implement CEM/VOC programs that enhance critical business measures including revenue generation, operational efficiency, cross-channel service alignment, customer retention, base management, loyalty, and brand advocacy.

Prior to InMoment, Erich was a Consultant with several global consulting firms. He holds a B.S. in Industrial Engineering from Rutgers School of Engineering, and his grandmother is quoted as once saying, "He's a lot brighter than he looks, so I'd suggest you keep him around."



Tabitha Dunn
CCXP, Managing Director, Customer Insights
Citrix Systems

Tabitha leads the Customer Insights team at Citrix, focusing on driving customer retention, delivering excellence in market research practices, developing customer behavioral insights through analytics and predictive modeling and turning customer feedback from listening posts (such as NPS®) into actionable insights – ensuring a great customer experience all along the customer journey from Awareness to Advocacy.

Tabitha's 15+ years of expertise as a customer experience leader has helped companies to turn a wealth of customer data into actionable insights and drive bottom-line and strategic impact. Tabitha has designed successful customer experience programs at Xerox, Philips Healthcare and Citrix, in addition to becoming a recognized expert in customer metrics and the customer experience discipline.


Annette Franz

*CCXP, Director, Customer Outcomes
Fidelity Investments*

Annette Franz shares her passion for helping companies understand the importance of the employee experience and its role in delivering an exceptional customer experience, as well as how to transform their cultures to ensure the customer is at the center of every conversation, through her blog, [CX Journey](#). She was recently recognized as one of “The 100 Most Influential Tech Women on Twitter” by Business Insider and has been recognized by several organizations as a top influencer in Customer Experience. She is CEM Certified and is an active CXPA member, as a CX Expert, CX Mentor, and a SoCal Local Networking Team Lead; she also serves on the Board of Directors.


Peter Haid

*CCXP, Director
The Strativity Group*

Peter has more than 16 years of B2B/B2C experience in the areas of Customer Experience Management (CEM), market research, advisory/consulting services, engineering, operations, M&A, strategic partnerships, performance measurement, and product management.

In recent years Peter earned his practitioner badge by leading two F500 global CX programs. This allowed him to mature his skills in all aspects of CEM, including assessments, strategy, brand alignment, employee engagement, Voice of Customer programs, measurement methodologies, customer insights, market segmentation, personas, journey mapping, process design, text and speech analytics, social strategies, and vendor evaluations.

At Strativity, Peter and his colleagues transform Customer Experience insight into real-world action, offering corporations and brands the tools, training and thought leadership they need to become fully customer centric.

Prior to joining Strativity, Peter was Vice President of Business Lines at E Source – providing research and advisory solutions to the utility industry in North America.


Lynn Hunsaker

*CCXP, CX ROI Strategist
ClearAction*

Lynn Hunsaker’s career in the CX field began in 1991 as chair of a 12-country, 6-division taskforce designing customer satisfaction methodology at Sonoco Products. At Applied Materials she led cross-functional CX transformation as VoC Manager, Customer Satisfaction Improvement Manager, Head of Corporate Quality, and Director of Marketing & Business Development. Lynn taught marketing at UC Berkeley Extension for 5 years and is past president of Silicon Valley AMA. She is a Certified Professional Marketer, Certified Quality Manager, and Certified Practitioner of Myers Briggs Type Indicator. Lynn is recognized by many organizations as a top influencer of customer experience. She is author of 3 handbooks on Amazon, including *Innovating Superior Customer Experience*, and writes a monthly column on B2B CX. ClearAction’s Customer Experience Excellence online course is CXPA-Authorized Resource & Training for the CCXP exam. ClearAction is a trailblazer in customer experience enablement, aka CX 2.0, with innovations including the CX ROI maturity assessment and building blocks.


Aimee Lucas

*CCXP, Customer Experience Transformist & Vice President
Temkin Group*

Aimee has over 15 years of experience improving service delivery and transforming the customer experience through people development and process improvement initiatives. Her areas of expertise include market research, program management, marketing, and instructional design and training.

Aimee's research and consulting efforts are dedicated to transforming customer experience within large organizations. She leads the Temkin Group's research in the areas of employee engagement and B2B customer experience. She regularly speaks at industry events and leads training workshops.

Prior to joining Temkin Group, Aimee implemented the client experience strategy and managed the Voice of the Customer (VoC) program for Crowe Horwath LLP, one of the top 10 public accounting and consulting firms in the US. Her work included planning and managing strategic initiatives and collaborating with cross-functional teams to introduce new-to-company functions and improvements. She also started the firm's internal market research function.

Aimee is a graduate of the University of Notre Dame with a bachelor's degree in marketing management. In her free time, she volunteers as a marathon coach for the Leukemia and Lymphoma Society's Team in Training program.


Jack Mackey

*CCXP, Vice President and Chief Evangelist
SMG (Service Management Group)*

Jack is a Founding Member of CXPA. He is passionate about helping companies energize their people to create loyalty-inspiring customer experiences. In his 11 years with SMG, Jack has advised and assisted senior executives from more than 600 companies to implement customer experience measurement, mobile research technologies and Service Profit Chain analysis. Clients seek his expertise on location analytics, omni-channel data collection methodologies, data integrity processes and integrated dashboard reporting of Voice of the Customer data and metrics. He teaches performance improvement strategies at client/industry conferences and is legendary for instilling a spirit of "creative discontent" in his audiences.


Diane M. Magers

*CCXP, Customer Experience Executive
Insights. Innovation. Impact.*

A little about me...

Passionate CX professional and change agent. Sherpa for new and developing customer obsessed leaders. Thought leader and innovator for ways of engaging associates and customers. Spirited entrepreneur. Skilled in business benefits development and systematically embedding CX into an organization. Believe that brands who win choose to focus on human and emotional elements. Develops the hearts and minds of others. Firm executor in the 'pay it forward' model. Writer, speaker and artist.

Here to help you with lessons learned on what worked and what didn't - more formally,...

Diane's demonstrated leadership abilities helps organizations design and execute strategies to drive customer obsession with targeted business results. Currently with AT&T's Office of the Customer, she is building and executing programs to drive change in their culture, systematically embed CX, and strategically drive CX innovation.

In 2011, she founded Customer Experience Catalysts, a thought leadership and consultancy practice helping brands identify and optimize their opportunities to engage customers and associates. Clients include VMWare, Honeywell, Blue Cross & Blue Shield and Align Technologies. She developed and led Customer Engagement, Customer Strategy and Business Transformation projects at Sysco including omni-channel design for call center, sales interactions, website, digital platforms for product and business services. She brings nearly 25 years of experience in customer experience and engagement, sales and marketing with complex organizational change management for measurable business results.

Diane Magers holds an M.S. in Clinical Psychology and an MBA. She is a Certified Customer Experience Professional (CCXP), and Promoter Score (NPS), Voice of Customer (VoC) and Customer Experience Management (CEM) certified. Additional affiliations include CXPA (founding member), LUMA Institute, Board member for CXPA Certification and active volunteer for the Autism Society of American, Leukemia and Lymphoma Society and the American Heart Association. She resides in Dallas with her family.



Andrew McInnes

*Director of Sales
MartizCX*

Andrew McInnes is Director of Sales at MaritzCX, helping organizations define and execute winning CX strategies through cutting-edge software and in-depth research and consulting services. McInnes joined MaritzCX via Allegiance Software in 2012, where he led product and partner marketing before moving into sales. Prior to that, he spent five years in Forrester's customer experience research group. As an Analyst, he led Forrester's coverage of voice of customer, voice of employee, and customer journey mapping. He also established the firm's research on voice of customer software. McInnes graduated summa cum laude from Boston University with a degree in History and worked as a US Senate intern and non-profit lobbyist before beginning his career in customer experience.



Yvonne Nomizu

*Director
Pacific Consulting Group*

Ms. Yvonne Nomizu leads PCG's Service Innovation practice which helps clients design customer experiences, develop service enhancements, launch new services, or streamline service delivery. Ms. Nomizu has worked in the service arena for over 30 years as a line manager in the service-intensive businesses of hotels/hospitality, consulting, financial services, and high tech. In her work with government agencies, Ms. Nomizu has leveraged her varied, cross-functional experience in marketing, new product development, consulting, and operations. As a principal with CSC Index, she streamlined customer-critical business processes and restructured organizations in various industries. Her customer service experience also includes five years in the hospitality industry where she was trained in all facets of hotel operations, opened new hotels, conducted consumer research, planned guest services, and streamlined service operations. She was New Products Director at a Johnson & Johnson company, Director of Marketing at Holiday Worldwide, Vice President of New Products at Innoventry (a financial services start-up), and Vice President of Consulting Services at Startups, Inc. (professional and web services). Ms. Nomizu also founded Sakari Consulting, a firm which helps companies build customer loyalty through exceptional products and service. Ms. Nomizu has worked with federal government agencies since 2002, understanding drivers of customer satisfaction, finding creative service improvements, and piloting new service concepts. She was involved in the formulation of a division-wide customer satisfaction strategy at the IRS and subsequently led client teams to successfully reduce cycle time, create more persuasive and succinct

communications for customers, and improve the ease of conducting transactions. She holds an AB cum laude from Harvard University and an MBA from the Stanford Graduate School of Business.



Jim Rembach
Chief Spokesman
Customer Relationship Metrics

Jim Rembach is a Certified Emotional Intelligence practitioner, Host of the Fast Leader Show podcast, Customer Experience & Employee Experience Expert and loves to help others (connect on [LinkedIn](#)).

After several years in retail and contact center operations with companies like AutoZone and Deluxe Financial Services Jim leveraged his experience and analytical skills for clients of Customer Relationship Metrics.

For the past 20 years, Jim has nurtured his servant spirit by giving back and helping various associations, church groups, and individuals.

Jim is a frequent speaker, writer, and presenter and is a sought after creative expert. What others think:

"Few people possess as much knowledge and have as much passion about employee engagement/retention -- and its overarching impact on the customer experience and the enterprise."

"...His past experience in operations builds the credibility that follows with the art and science of capturing the customer's voice...And what's best, he'll help you with actionable tasks to get the job done."

"...Jim is brilliant. He is constantly reminding people to challenge their long-held assumptions and explore new trains of thought...Jim sits on our Board of Advisors and helps us all re-think the content every year, thereby keeping our events at the bleeding edge of the industry."

Jim is an active member on several CXPA committees.



Karl E. Sharicz
CCXP, EdM, Principal and Founder
CX Partners

Karl brings over thirty years of skills and experiences gained in high-tech research and manufacturing B2B environments along with proven business acumen. Throughout his career he has served a broad range of roles within marketing, sales, training, and training management—developing internal and external customer relationship skills and building a decided customer-centric focus along the way. In 2014, Karl founded CX Partners and offers professional services around all aspects of CX on a contract basis to all organizations, particularly those looking to start or advance their journey in the fascinating world of Customer Experience Management.

In his former corporate role within Tyco SimplexGrinnell, a leading fire and life-safety provider doing business throughout North America, Karl led the Customer Experience journey where he and his team focused on driving those elements of customer relationships and experience that increased customer satisfaction, reduced customer churn, increased customer lifetime value and in-turn helped drive service revenues.

Karl is steeped in the Customer Experience Management discipline, including developing a customer-centric cultures; determining the voice of the customer and deriving insights and understanding; fostering organizational adoption and accountability; creating customer experience strategies, designing approaches that will achieve customer experience excellence; and setting up metrics and measurement systems that help drive organizational return on investment.

Through his knowledge of adult education and learning styles plus prior experiences as a director of training, he offers additional skills in developing structured learning environments. During his tenure at Tyco for example, Karl developed the Next Improvement in Customer Experience (NICE) Workshop concept that has been in operation throughout the organization since 2010 and driving new levels of customer focus and customer retention. He has developed certification programs for professional services teams, and was a certified consultative sales trainer and coach.

Karl holds a Master's degree in Education from Boston University. He currently serves on the Board of Directors of the CXPA and also serves on several key CXPA committees. Karl served in past leadership positions within the American Society for Training and Development (ASTD). Karl runs blog called [The CX Chronicle](#) and is well published—the two most recent articles of which appeared within two prominent CEM journals. In addition to his professional CX persona, Karl doubles as a singer-songwriter and musician and has recorded two CDs of his original music.

**Sarah Simon**

*Director, VoC Consulting
Confirmit*

Sarah is a career insights professional with 19 years of experience in the business intelligence industry. Specialties include VoC architecture, empathy mapping, developing linkages to business performance, reduction of customer defection, results analysis and communication, with expert survey design skills. Sarah's passion is operationalizing Voice of Customer insights to drive Customer Experience optimization.

Currently, she serves as a Senior Solutions Consultant at Confirmit, where she uses in-depth needs analysis to architect new feedback initiatives from scratch, and runs diagnostics on existing programs to optimize structure and function to yield business insight.

Prior to joining Confirmit, Sarah served as Manager Program Design at Allegiance, where she used a consultative approach to understand and map client requirements in order to blueprint a VoC (CX, VoE, Partner, Research, etc.) program meeting unique business needs. Working for CustomerSat she managed several strategic client accounts as a research consultant. Before joining CustomerSat, she was a senior project manager at boutique market research consultancy TechFocus Research. Sarah was the client-side researcher for more than three years at software solutions provider FrontRange Solutions and also worked for web-survey pioneer IntelliQuest as a research analyst.

**Jim Tincher**

*CCXP, Mapper-in-Chief
Heart of the Customer*

With a lifelong passion for customer experiences, Jim founded Heart of the Customer to help companies of all sizes increase customer engagement. Before launching the company, Jim led customer engagement initiatives at Best Buy, Gallup and UnitedHealth Group. In the process, he became an expert in using Voice of the Customer research to identify unmet needs, develop new products and improve customer service. His Heart of the Customer journey maps are a powerful tool designed with one simple goal: customer loyalty. Customers ranging from start-ups to Fortune 500 companies use his processes to improve customer-focused results. His fascination with customer experience led him to test himself by becoming a Certified Customer Experience Professional, only the second in the world to earn such a designation.

About CXPA

The Customer Experience Professionals Association is the premier global non-profit organization dedicated to the advancement and cultivation of the Customer Experience profession. We increase the impact and visibility of Customer Experience professionals, facilitate effective member-to-member sharing, and establish respected standards.



Find us at: www.cxpa.org