

Signals - to progress/unblock CX maturity in your program today

What this means in practice

Foundational

- Collect solicited feedback, near real time transactional, and for overall relationship
- Augment feedback with *operational data* (AHT & FCR), *financial metrics* (Revenue, Loyalty status or CLV), and simple *behavioural metrics* such as Churn.
- Ensure trustworthy, sufficient data to drive action at all levels- collaborate with data science/engineering

Progressing/Integrating

- Establish a data quality process
- Integrate systems (such as CRM, CDP) with *more complex* operational data such as Repeat Contact Rate, or financial data such as Customer Acquisition Cost per customer segment.
- Incorporate digital behaviour & conversational data into analytics efforts

Differentiating

- Feedback collection, data integration and reporting are oriented by journeys
- Established single source of data used by the entire organization
- Generate predicted financial, attitudinal and behavioural data points to understand the "silent majority"

Tips to unblock maturity



- **Also capture unsolicited feedback** via social reviews, contact center transcripts and chats
- Seek to understand (add survey questions about) **cross-channel behaviour**.



- **Leverage journey maps** to create a plan to address any blind spots due to data gaps.
- **Feedback from employees** is captured and integrated (EX) as well as VOCE (Voice of Customer thru Employee)

What this means in practice

Foundational

- Baseline and track performance in aggregate and across multiple segments for the journey moments that matter most
- Ensure employees in each department have access to relevant insights about their own accounts/channel/touchpoint
- Identify/validate experience drivers to improve, & leverage analytics & reporting for transformational opportunities

Progressing/Integrating

- Customer expectations by journey are understood via journey based insights
- Central customer profiles are created to enable a 360° view of the customer.
- Advanced scoring (ie. Digital Experience Score, Risk Score) via x-channel insights
- Executive dashboards are created with integrated goals, business & customer insights

Differentiating

- Real-time 360 degree view of the customer
- Predictive analytics for marketing and sales/cross-sell
- Predictive revenue impact by journey
- Continuous monitoring and analysis of customer journeys to understand changes in real time

Tips to unblock maturity



- Explore **AI capabilities** to Deliver predictive and prescriptive actions to front line teams.
- **Fine tune text analytics** topic sets and theme tags to understand emerging trends



- Use cross-channel insights to trigger automated **personalized actioning & response**
- Conduct **financial linkage** analysis

What this means in practice

Foundational

- Vocal & visible executive sponsorship of the CX function
- Ensure employees are trained on closed loop feedback, new hire CX 101 education
- CX Vision & Strategic Plan awareness & communication campaign
- Clear evidence of CX adoption: Employees using CX metrics and insights to drive behaviors and front line coaching

Progressing/Integrating

- CX strategy aligns with business goals via regular CX Leadership forums
- CX team uses insights & analytics to anticipate impact and influence experience design
- CX storytelling happens through success stories & celebration communications
- Internal CX certification program exists

Differentiating

- A senior CX leader guides the organization, backed by executive team
- CX is embedded and proactively involved in all client-facing enterprise projects (eg. risk assessment, UX design reviews, operational readiness)
- Organization participates in CX workshops & annual CX summit

Tips to unblock maturity



- Define your **CX North Star** & strategic plan
- Use this to guide your roadmap activities
- Use a prioritization model for CX projects/initiatives



- **Continuous improvements** across journey touchpoints are actively tracked, measured for impact, and **reported across functions** --- serving as primary feeder for success stories.

Action - to progress/unblock CX maturity in your program today

What this means in practice

Foundational

- Established best-in-class closed loop feedback process for customer recovery
- Clearly defined organizational roles & responsibilities around intended tactical and strategic action, per brand promise.
- Align on a shared singular metric (NPS or OSAT) across the enterprise

Progressing/Integrating

- Ability to link issues in one channel to the root cause in another - enabled by a shared customer record
- Actions are driven by alert workflows, across channels
- Enable the right team member behaviors across the customer journey

Differentiating

- In-the-moment personalisation
- Real-time data-based recommendations available to customer-facing teams
- Data driven experience design drives product and service innovation at scale

Tips to unblock maturity

- Establish an outer loop process that feeds a **continuous improvement funnel** of transformational initiatives.
- **CX governance** - a system for clear decision making, and collaboration on practices to ensure teams stay accountable to shared goals



- Identify and take action on top 'at-risk' accounts/customers using **predictive account health** and **churn risk reporting**.

