

10 Critical Steps To Move Your Customer Experience To The Next Level: How To Implement A Successful CX Program

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Our Thoughts

The purpose of this white paper is to give you the practical advice you need to move your Customer experience to the next level. To do this you will need to design and implement an emotionally-focused and customer-centered Customer Experience.

Many of our clients find it's easy to accept the fact that emotions play a significant role in the experience. But then, they feel unclear of what to do. They don't know how to address the emotions in the experience.

This situation isn't unusual. We find that many businesses today know that putting the emotional state of Customers at the heart of everything they do is important; it is the actual doing of it that seems to flummox them.

However, it's not as complicated as it might seem at first. Beyond Philosophy are one of the pioneers in the Customer Experience market place. We were established in 2002 and therefore our experience is vast. We would like to share with you the 10 critical steps for moving your customer experience to the next level when implementing a customer experience program. We go into these areas in our training, however this will give you a good understanding of the task ahead.

Step 1: Gain Support for Your Efforts

The idea that the emotional, irrational side is the most important factor in the CX is a vital concept, particularly when you propose changing the goals of your organization to report to a new CX metric. Therefore, your first step for this new CX journey, securing the commitment of your senior team to address these emotional moments in the CX, is critical to its success. This crucial step will make or break your CX agenda.

Change must come from the top. Frankly, so must the funding for your efforts. Without the support of those that sign the checks, you won't enjoy a lot of successes affecting change.

Once you have the commitment to address the CX from the senior team, you need a dedicated team made up of people throughout the company. A cross-functional representation of all the departments in your organization, the CX Team (CX Team) brings together all the parts of the CX as one whole experience.



Then, in an early team session, define the team's role and responsibility in the implementation journey. Establish goals for each business channel and institute how to work together in a larger sense. Early stages are also an excellent time to examine how to implement the ideas and tools the team will develop in both a top-down and bottom-up way. One big question, essential to the start of this journey, is to understand how to communicate and raise awareness throughout the organization. In our experience, many of the tools that successful organizations have today were born of these early sessions.

Step 2: Discover Where You Are Today

Next, you must define the current emotional experience and where those emotional moments occur. A clear and honest understanding of your starting point is essential to provide an accurate map and plan for where you want to go.

The best way to create a strong foundation for your efforts is through research. We recommend a series of customer feedback sessions as well as an outside-in approach to your current CX. By this, I mean that you walk the CX as if you were a customer. You should buy your widget, subscribe to your service or attempt to make a claim on one of your policies. Through these exercises, you will get a better idea of the moments in your experience that are working, as well as the ones that are not.

This point is where a number of organizations will bring in consultants to undertake this work. Why? A few reasons:

They are from “the outside.” It is difficult being a prophet in your own land. Consultants from outside the organization can say things that are not politically acceptable to say internally.

They are independent. Consultants don't have an axe to grind. This point is particularly significant when those outside the CX Team perceive bias in the CX Team's view.

They know best practices. Consultants have many examples of what to do — and, perhaps more importantly, what not to do.

They have experience convincing skeptics. Consultants have dealt with objections to CX Program improvement efforts many times before and can persuade people to a more customer-centric view.



Step 3: Gain Understanding of the Current Behavior of Customers.

Understanding why current customers behave the way they do and have the habits they have is essential to moving to the next level. Research on the present experience provides this critical understanding. Data gathering reveals what moments in your experience evoke which emotions and how these emotions drive customers' current behavior. Our experience is few companies have undertaken proper research exploring how customers feel or what emotions are involved in their experience.

Behavioral Journey Mapping enables CX Teams to design a CX that meets the subconscious emotional needs of customers. This process looks at the CX from the emotional perspective, including how people feel upon entering it. It also helps one recognize how these emotions influence an experience. Moreover, it helps you see how to build a deliberate and emotionally engaging experience that drives value for your customers—and your organization. (You may wish to check out our website www.beyondphilosophy.com to see an example of this exercise.)

Step 4: Define Where You Want to Go.

Now that you have a comprehensive understanding of where you are, it's time to define where you are going. The CX Team now needs to decide what experience they are going to deliver in terms of an emotional outcome that drives value (\$\$\$). Here is where we use something we call the Emotional Signature®.

The Emotional Signature is the level of emotional engagement a company has with its customers. These emotions manifest in every moment of the Customer Experience, beginning with the brand promise to long after the interaction has ended. You can analyze your current level of emotional engagement with your customers. Then you can help build a strategy to create a deliberate Emotional Signature that evokes an emotion that will bring your customers back to buy more with you. We define this emotion in what we call the Customer Experience Statement (CES).

The CES defines the specifics of the Customer Experience you are trying to deliver. It becomes the focal point of the Customer Experience Program. It informs employees at all levels how to approach the decisions they make every day. Without a clearly defined CES, everyone in the organization has different ideas and ways to achieve a better Customer Experience, a strategy that provides neither a comprehensive nor consistent experience.



A CES might include a phrase like “To provide an experience that makes clear that customers can trust us.” Then, the strategy and specific tools you create for the implementation will work toward the goal of “making clear to customers that they can trust us.” The CES should also contain what this means the organization will do and also what they won’t do. For example, if in your CES it states you want Customers to trust you, then you should always phone a customer back when you say you will as this action builds trust. It also means you won’t pass Customers from one department to another as this doesn’t build trust. (You may wish to check out our website www.beyondphilosophy.com to see examples of these important concepts and tools.)

Step 5: Design the New Experience.

Once the team has established all these items as a foundation, it’s time to begin the work of taking Customer Experience to the next level by designing the new experience. We know what emotion drives value (\$\$\$) from the Emotional Signature exercise. We also know what experience we are now trying to deliver from the CES. Now, we need to design an experience that embraces the rational, emotional, subconscious, and psychological experience.

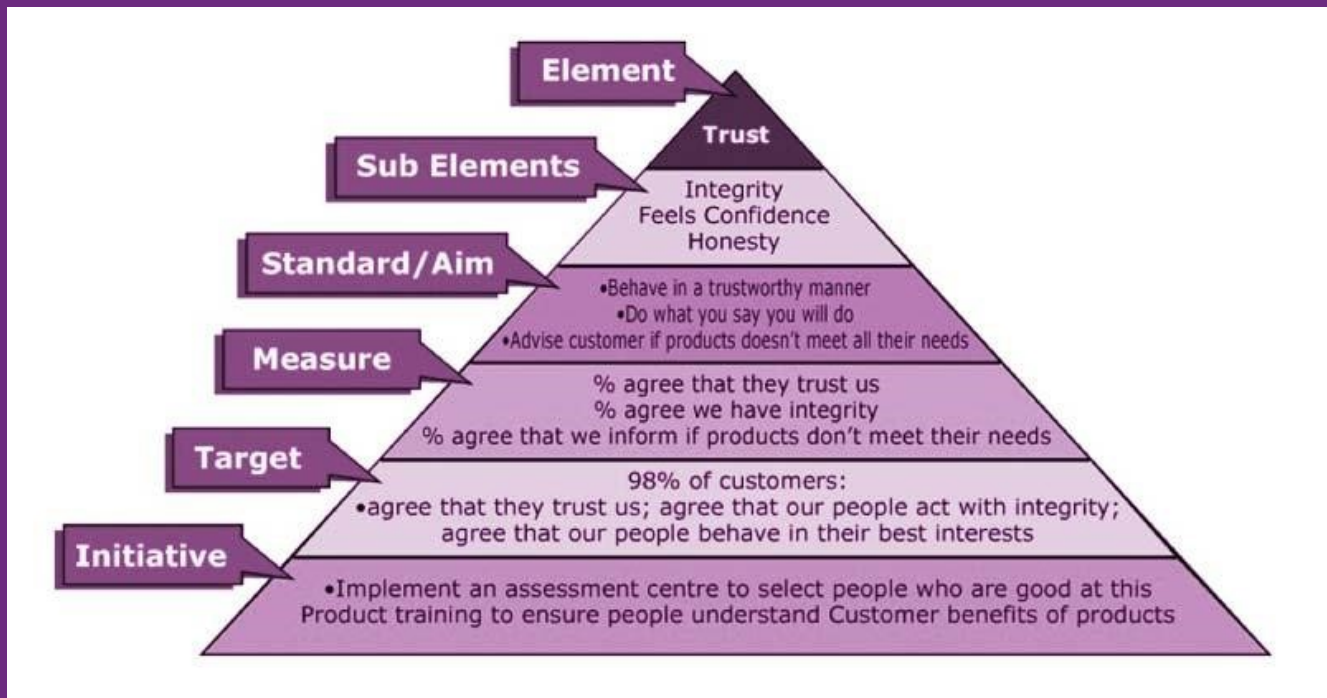
It’s not uncommon to falter at this point. While research on the current experience is easy to dive into (if difficult to hear the findings at the end of the day), it can be challenging to know where to start when designing the new Customer Experience. However, the Behavioral Journey Map can be an excellent guide at this point in the process. (This point is another where the consultants are handy again.)

Step 6: Establish Specifics for Measuring Progress Toward Your Goal

How you measure achievement of Customer Experience improvement goals is the essential next step. If you create a strategy but then do not link its implementation to a specific goal, not to mention forgetting to prescribe actions your team needs to take, you cannot track your success.

To establish this goal and the activities needed to reach it, we use a process we call the Pyramid, which aligns your Customer Experience strategy to a concrete goal with detailed actions needed across the team:





The Pyramid

Let's say you use customer satisfaction surveys as the current measure for your Customer Experience performance. Starting at the top of the Pyramid, you'll see:

The Element here is **Trust**, the emotional goal of the new Customer Experience from our hypothetical CES example.

The Sub-Elements of trust are **integrity, feels confidence, and honesty**, which are contributors to the state of being trustworthy.

The Standard/Aim, on the level below the sub-elements, shows what the organization defines as behaving in a trustworthy manner.

The **Measured** level represents the goal set to show achievement of the Standard/Aim. So, for example, it could be that the organization wants a 98% success rating on customer satisfaction surveys reporting that customers feel they can trust the organization.

The

Target is the percentage chosen that is the goal, e.g. 98% of the reviews rate the team as trustworthy.



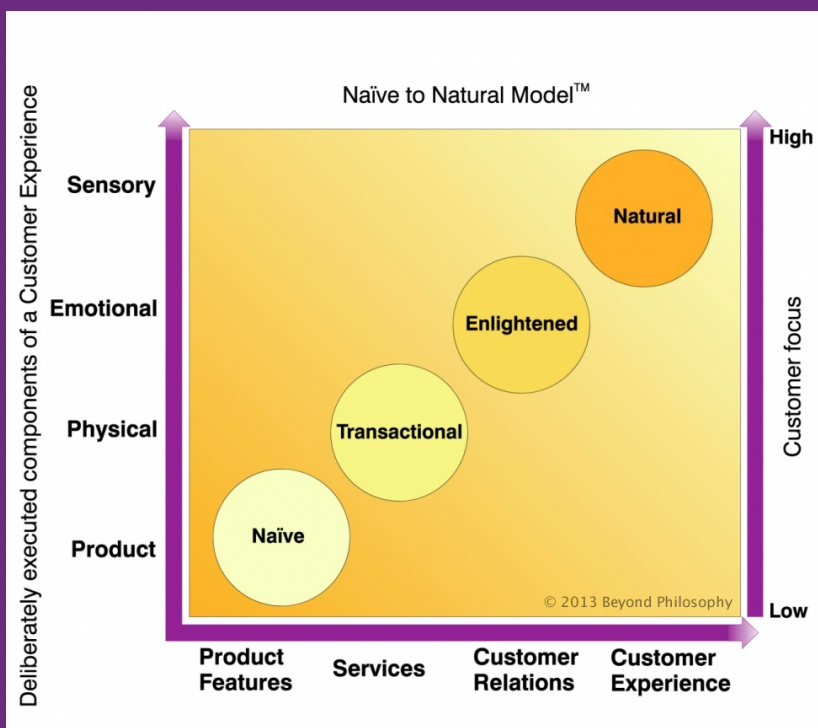
The **Initiative** at the base of the pyramid is the specific action taken by the CX Team to achieve the Target that measures the success of the CES implementation. In our hypothetical case, it could mean including additional training on the product line for customer-facing employees.

(To learn more about the Pyramid, visit www.BeyondPhilosophy.com or read our first book Building Great Customer Experiences, Palgrave Macmillan, 2002.)

Step 7: Analyze the Current Employee Experience.

Another way to learn more about where you are as an organization is to look inside using what we call an Internal Mirror. An Internal Mirror is an assessment that reflects the employee experience. It reveals the state of employees' emotions, as well as areas they feel unprepared to address with customers, a.k.a. areas you will need to address in training. The Internal Mirror also shows whether their current emotional state allows them to deliver the Customer Experience the team desires. In other words, at a personal level it shows whether their work environment allows them to provide the emotional outcome as specified in the CES.

The Internal Mirror is based on the concept expressed by our Naïve to Natural Assessment that I wrote about in *Revolutionize Your Customer Experience* (Palgrave Macmillan, 2004).



The Naïve to Natural Model



Naïve to Natural is a Customer Experience assessment model we use to assess our client's customer centricity, defining the current level of customer focus you have. The least customer-focused organizations are what we call **Naïve**. As they change, they move through **Transactional** and **Enlightened** until they reach the goal for customer centricity, **Natural**. The assessment looks at what parts of your organization are where on the journey toward being Natural or focused on Customers first. However, to reach this Natural state, you have to look at your whole process, all the parts of the experience, and most importantly where you are going to make changes that modify the status quo.

The Internal Mirror considers a number of aspects like:

- What are the key measures the front line team is trying to achieve?
- What type of people are recruited and for what jobs?
- What training are employees given?
- How are people coached?
- How are the processes designed?
- What are the culture and leadership like?
- What is the employee's emotional state?

The Internal Mirror helps the CX Team gain a complete understanding of the environment employees work in and all the elements affecting the experience. This information is crucial to the CX Team so they can test the environment for training employees on how to deliver that outstanding Customer Experience.

Step 8: Recognize Training is Essential to Achieving Your Goal.

Usually, there exists a gap between the Customer Experience an organization wants to deliver and the Customer Experience the employees actually provide. Closing the gap between the ideal and the reality requires training. Cultivating next-level training is an important part of the CX Team's design phase.

When employees don't receive training on the particulars of responding to customers based on their emotional state, it is unlikely they will deliver on the CES in a consistent way. However, customer-facing teams are typically not trained on these vital concepts.



Gaining these skills requires advanced soft skills training for employees. Training should have a foundation in two critical skills the team needs, which are:

- How to recognize a customer's emotional state when entering the experience
- How to convert a customer to feeling the emotion defined by the CES

Most organizations don't know how to coach soft skills or don't have a way to provide feedback to improve those scores.

We developed an exercise we call **Memory-Maker Training**. It shows people how to determine a customer's emotional state upon entering a Customer Experience and then how to convert them to feeling the desired emotions that drive the most value as defined by the CES. It also examines the verbal and nonverbal communications that drive the desired emotions. (You may wish to check out our website www.beyondphilosophy.com to see an example of this exercise.)

Step 9: Guide the Way to Success.

Developing a custom training Guide for employees is another important step for your implementation of an improved Customer Experience. Guides detail the expectations of the next-level Customer Experience program. The guide shows how customer service agents could deliver both a next-level experience and achieve the emotional goal defined by the CES. In other words, it explains the who, what, and why of the desired deliberate experience, as well as where to provide it and with which deliberate behaviors.

The guide serves as a foundational element of the training that could be a clear-cut way for agents to measure and define interaction with customers. Let's say the CES states that they want the Customer "to feel informed." The guide would address the following areas:

- Why people want to feel informed
- The psychology of feeling informed
- How to recognize if customers are feeling informed
- How to encourage them to feel informed



Guides are a great example of how to be deliberate about the experience, not leaving it up to chance. When consulting, we have developed guides for our clients based on a comprehensive synthesis of relevant research in psychology and behavioral economics. These concepts are brought together and customized for the guide. The goal is to provide employees with a rich understanding of these principles. It's not just a "to do" list, but instead gives team members an understanding of not only *what* to do, but *why* it is important.

Guides build awareness of the interaction and direct a conscious management of the Customer Experience. They give your employees a formula for responding to customers based on their various emotional states. It is not scripted, per se, but it does suggest language, body language, and actions that will deliver on the CES. For example, guides might identify a customer's emotional state with the key phrase or keywords an employee might hear and provide what the employee should do or say to make that emotional connection with the customer. We want those things to become natural by the employees, like a muscle memory response to stimuli.

Organizations that invest in a guide tend to see improvements in loyalty score. Perhaps best of all, they also see improvements in employee engagement and employee satisfaction scores as well.

So why does employee satisfaction improve? That's simple: because employees have been given the tools for change management.

It is no accident that these guides give specific actions to deliver on the principles. When you implement a transformational program like the one required to take a Customer Experience to the next level, having a guide that addresses what they need to do makes doing it easier for employees. As a cultural transformation piece, the Customer Experience changes will be significant, i.e., the customer-facing employee will be required to behave differently. The improvement in Employee Satisfaction scores occurs because employees understood what the expected behaviors were and how to align that with their performance. In our experience, this approach makes employees feel more engaged and receptive to the changes.

Step 10: Adjust Your KPIs to Match Your Customer Experience Goals.

When the organization wants to move to the next level, the Key Performance Indicators (KPI) must move to the next level also. KPIs represent a metric of what is considered success by most organizations.



Many times the KPI is measured by the majority percentage in operationally-driven tasks, e.g. sales or profitability. Unfortunately, this emphasis leaves a minority portion of the KPI dedicated to achieving the desired Customer Experience emotional outcome.

What gets incented gets done. Therefore, choosing KPIs that incent improved performance in Customer Experience is essential to success. In our Customer Experience Consultancy, we advocate changing the way customer-facing employees' performance levels are measured with KPIs emphasizing success in the results of our Customer Experience efforts. Furthermore, we recommend that everyone throughout the organization has at least some part of their incentives and performance assessment tied to how the Customer feels.

Exceptional Efforts Create Exceptional Results

There you have it. We have given you the practical advice you need to design and implement an emotionally-focused and customer-centered Customer Experience organized into ten steps. Our hope is it will help you take your new and improved Customer Experience to the next level.

To recap, there are many things that are important in implementation, but the main factors are summarized in the following ten steps, which include:

Step 1: Gain Support for Your Efforts

Step 2: Discover Where You Are Today

Step 3: Gain Understanding of the Current Behavior of Customers

Step 4: Define Where You Want to Go.

Step 5: Design the New Experience.

Step 6: Establish Specifics for Measuring Progress Toward Your Goal

Step 7: Analyze the Current Employee Experience.

Step 8: Recognize Training is Essential to Achieving Your Goal.

Step 9: Guide the Way to Success.

Step 10: Adjust Your KPIs to Match Your Customer Experience Goals.



These ten steps are vital to achieving the next level Customer Experience today's CX Teams want. When as a collaborative team you can assess what you currently have with a more empirical eye and prescribe what is needed to achieve the desired outcome, you can design an improved Customer Experience.

However, designing is only part of the implementation. You must also articulate the particulars about what needs to be done to be successful and complement that with training on these specific actions for individuals to take. Then, add a goal to measure the team's success and incentives to inspire change.

Employees will also respond to the more positive interaction with customers, delivering on that improved experience, and receiving the positive feedback from them. Our perception is that people enjoy the job more because they're not being hit over the head with transactional things but instead are helping people. It creates a more humanized place to work.

Invariably, we see that our clients get better results when they design the implementation program in this way than when they don't. The biggest improvements tend to be in advocacy sections, including Net Promoter Scores. It requires exceptional effort, to be sure, but only because exceptional efforts get exceptional results. Although you should beware that after our clients had such exceptional results they also had much more work. Exceptionally more work. Don't say we didn't warn you.

Are you ready to take your organization's Customer Experience to the next level with exceptional results, too?

To learn more about the emotional and psychological concepts behind customer behavior that affect your Customer Experience, please read our book [The Intuitive Customer: 7 Imperatives for moving your Customer Experience to the Next Level \(Palgrave Macmillan, 2016\).](#)



Additional Resources

You may be interested in reading some of our other blogs and white papers on this subject:

Uncover The Specific Emotions You're Evoking

Happy Customers: How To Get Them!

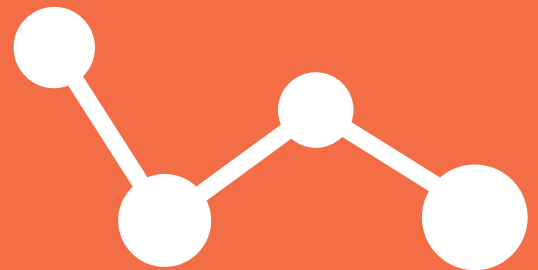
Must Have Tips For Selling To The C Suite

How To Measure Customer Emotions

Changing Customer Behavior With A Little Nudge

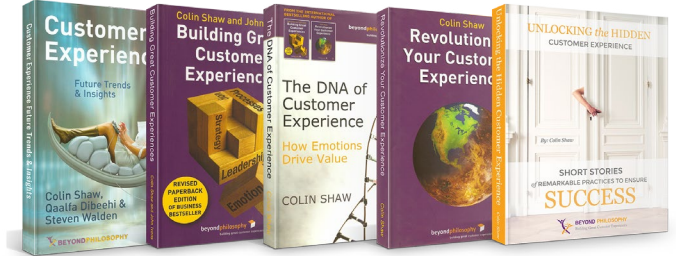
Webinar: Are Customer Emotions & behavior The Future Of CX

White paper: The 7 Key Ingredients of A successful Customer Experience program In Telecoms



About Beyond Philosophy

Beyond Philosophy are literally the world's first dedicated Customer Experience company. Founded in 2002 by our CEO, Colin Shaw, we have built an excellent reputation of being Thought Leaders in Customer Experience.



This is not what we say, it's what others say. We are proud that Colin Shaw our CEO, has been recognized by LinkedIn as being one of the world's top 150 Business Influencers and by Brand Quarterly as one of the 'Top 50 Marketing Thought leaders over 50' and written 5 books on Customer Experience.

Beyond Philosophy help organizations move to the next level of the customer experience. There are many case studies that highlight our work. One of our clients Maersk Line, improved their net promoter score by 40 points in 30 months and then had a 10% rise in shipping volumes as a result of our work.

Beyond Philosophy provide three services.

Consultancy services – both strategic and tactical so we can help guide you to improve your customer experience.

Training services – we can train your CX team on how to improve your customer experience as well as your front line team with our memory maker training.

Specialized research services – we provide some innovative research techniques that discover what drives and destroys value for your organization.

If you'd like further information please contact Beyond Philosophy LLC on our website Beyondphilosophy.com.

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