

# Customer Experience Roadmap for Driving Customer Advocacy

As has been the case with nearly every incarnation of customer focus activity, this focus on “experience” is inadvertently randomizing corporations, sending people out on tactical missions to map customer touchpoints with no future relevance to the operation, and making a lot of consultants happy.

To make customer experience stick as part of your operation, you need to have an organized and phased approach for how to integrate this new competency into your organization. Without it, “CX” becomes one more customer focused “hoopla” event that your company tried for a while and then abandoned.

So here, based on working with scores of clients around the world...is the REAL world approach for how to integrate the discipline of customer experience into your operation – in a way that will make this competency stick and change how you do work.

## 1. Alignment around Experience

Insurance industry example below:



### #1 Alignment around Experience

*Shift from silo priorities to customer experience priorities*

Many organizations say they focus on their customer “experience” but few do the hard work to define the stages of their experience from the customer journey point of view. In the absence of this, all of the operating areas do their own thing, driven by their internal tasks and agenda and scorecard. A lot of work is done, often in the name of the customer, but it doesn’t add up from the customers’ experience to deliver a unified experience. The big things don’t get systemically fixed. We miss the opportunity for the big “wow” moments.

Here you define the stages of the experience and the moments of truth that comprise all of the experience touchpoints. This includes both the obvious touchpoints, such as “when the customer places their order” as well as those opportunities that might be missed, such as “when the customer places their 100<sup>th</sup> order” or “when the customer has contacted customer service three times in a month.”

In this stage of the work you lead your teams to identify the key top 10-20 moments of truth so that you can prioritize the touchpoints to begin working on improving in reliability and in weaving in those differentiating “wow” moments.

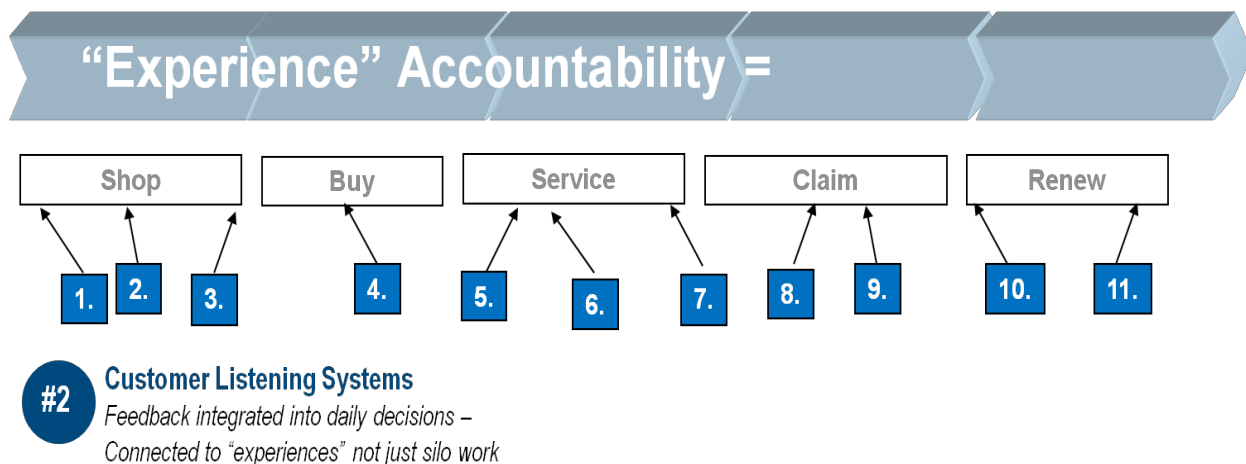
The significance of this is huge. Not enough companies understand that this is the first “duct tape” exercise

to get your organization moving together in one direction – and that’s to agree on the stages of your customer experience.

**This is the platform work for a customer experience transformation journey**, because once this is agreed to, from here, you can...

- a. Line up customer feedback to these stages – where you gather feedback on the experience.
- b. Connect cross silo operational metrics for the delivery of cohesive experiences.
- c. Establish reward and recognition that enforces key moments.
- d. Give leaders a manner in which to hold the company accountable – to stages of the experience – to cross functional teams who impact the stage. Getting agreement here means changing accountability from “down the silo” scorecards and dashboards to “across the experience” shared metrics and accountability.

## 2. Experience Based Customer Listening and Feedback



Because of the way we take feedback and then hand it off for resolution down the silos, we inadvertently send a “false positive” to CEOs and company leaders that customer issues are being resolved. See if this sounds familiar to you: As your results come in from surveys, reports, now social media, they are handed over to an operating area or silo to “go work on it.” The survey results are sent out into the company, where each part of the organization or silo interprets the results then decides what they will or will not do. What happens next is...

- a. Every leader interprets “go work on it” differently.
- b. Whatever department who has the survey results handed to them to “go work on it” does some action inside their own area, then reports back at the next meeting where it’s asked about.
- c. Because we take feedback results and categorize them into silo buckets, then dole them out to be fixed by silo – the customer experience doesn’t have a chance of getting fixed really – from the

customers' perspective.

Broken customer experiences are often the result of many things across the operation not working exactly right. For example; "billing" is a challenging customer experience not just because of what the Billing department does. Communications, sales, marketing, operations, IT and billing all play a role in what the customer ultimately experiences. Customers experience a company across the operation, not down the silos. So doling out the issues down the silo has to change if you want to move to customer experience accountability.

In addition where we get the information to inform what we solve and fix is frequently tied to when and how we get and interpret survey results alone. Surveys are important, but there are many opportunities to get close to customers and really "listen" in on what they have to say about the experience you are delivering to them that is driving them to buy more or driving them away. If we wait for the survey results, or rely only on the data within them, we miss the simplest, most easily understood and passionate feedback that can help us understand the customer experience "real time" – everyday. Some sources for expanding your customer listening are:

- Feedback customers provide during call center calls
- Customer input provided when they return something to you
- Internet feedback
- Feedback customers give your frontline folks in your stores

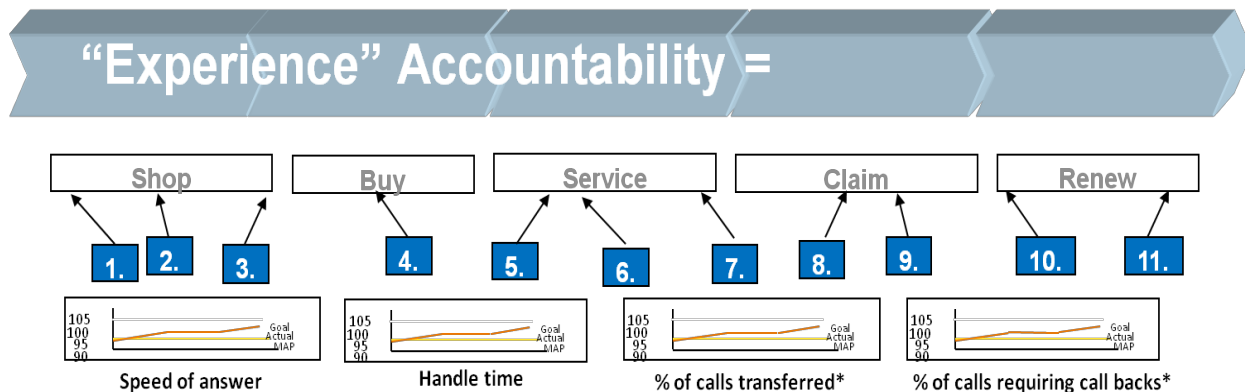
The work here is to determine how you can connect all of these listening "pipes" to take advantage of this information and trend and track it.

Collecting and organizing this information is important to prevent the "one off" fixes on things and to attach the issues where they connect along the customer experience. By having this type of "everyday" feedback, we loosen our reliance on surveys to take real-time action and also get better focus on the things that really matter. Included here is discussing the IT implications of "buy" vs. "build" of a listening system, and helping you to get to a path of building what you need for your company.

The work here requires committing to three alignment action items:

- Agree on the categories of customer issues that you will collect in a unified manner across the operation, so that you can consistently collect and trend listening feedback.
- Agree to start reporting customer listening feedback by customer experience stage
- Agree to stop handing off the experience issues to one department – identify the multiple silos that impact the experience and from there drive accountability

### 3. United Experience Reliability



#### #3 United Experience Accountability

*Drive cross silo experience reliability in key customer touchpoints*

Once you have done the foundational work of identifying your stages of the experience and have identified the key 10-15 “moments of truth” or customer touchpoints, you can start to build experience reliability in a focused manner that won’t feel like you are trying to change the world overnight.

This part of the work is about reliability in your experience, by not waiting for survey results...but proactively managing the key touchpoints with shared accountability across the silos. Do this by:

- Identifying and establishing KPI’s (key operational performance indicators) for your top 10-15 customer experience touchpoints.
- Bringing cross functional teams of people together to take experiences from “broken” to “reliable” to ultimately a differentiating moment. Once you’ve got this process down, you can move past the top 10-15 touchpoints. But start with just these few – otherwise it will become too overwhelming.
- Establishing what the forums should be for driving accountability. Something I recommend is a “Customer Room” – a practice that has had high impact with my clients’ organizations.

This idea comes from something we did at Lands’ End long ago to get us out of our day to day tasks and experiencing the world as we were delivering it to our customers’ doors. We stock-transferred in every outdoor product in the catalog to see how the products were packaged and what the hang tags and communication and outer packaging appeared. What a mess! But what an impact those exercise had.

We have now implemented this Customer Room with clients such as TD Ameritrade, St. Jude’s Children’s Hospitals, Bombardier Aircraft and many others – driving the operations to come together, drop their silo operations and think “experience”.

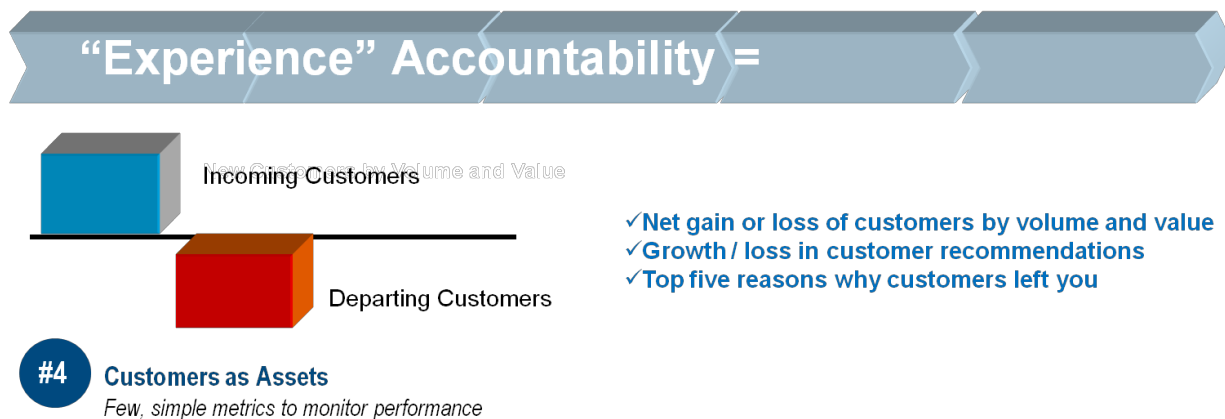
In a customer room, we depict the stages of the customer experience across the walls. Beneath each stage we show the artifacts of the experience that customers physically receive; the packing slip, hang tags, materials, overstock notices, etc. We also list beneath each stage, the complaints we’ve received, the KPI’s

for the key touchpoints and the survey results that are impacted by it. This brings the organization together to think “experience” rather than “my silo”.

We also play customer calls so the folks in the room can hear the voice of the customer talking about how the experience was delivered.

On a quarterly or monthly basis, we convene the customer experience room with leadership in the room, getting passionate about the places where we are letting customers down – sending teams off to determine cross functional fixes. As these teams work on improving customer experiences, they present their findings back and recommendations and ultimately results – making this room also a place of celebration. It takes the customer work off spreadsheets and puts the customer square in the middle of the business with passion, fun and a great amount of collaboration and innovation.

#### 4. Make Customers an ASSET of Your Business



I call this “customer math.” And this is about building passion across the organization and establishing a simple rallying cry for leaders. It goes like this:

*Rather than talking about customer retention, let’s begin each meeting saying the raw numbers of:*

- Incoming customers – outgoing customers = net growth (or loss) of customer asset in that period
- Customers who recommended us
- Top five reasons why customers left

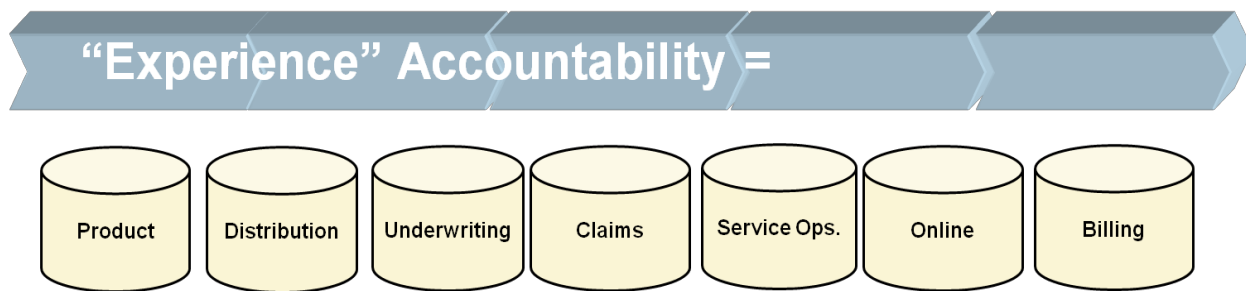
For many companies, just putting together these simple articulations of “incoming” customer requires an alignment in definition and certainly an alignment in data and databases as every part; every silo frequently has varying definitions. This is essentially the outcome of the experience you are delivering to customers – I call it “customers vote with their feet” on whether they stay or leave. And I have found it very powerful to always begin meetings with this simple report card of “earning the right” to customer growth.

At one Client Company, we wanted a visual to depict the outcome of the customer math each month or quarter --- so we came up with a pretty unique idea with marbles. We determined the mathematical

equation for the number of customers a single marble would represent. Then we began to begin every meeting with two bowls of marbles: one with a bowl filled with marbles representing the lost customers and one bowl filled with marbles representing the new customers. It really got people's attention at this company when the bowls were even, or when the "lost" marbles exceed the "new" customer marbles.

Decide if this type of simple talk track for beginning key meetings and giving leaders something to be passionate about regarding customers will help your company. Then determine your version of this simple metric...and how to translate and communicate it across your organization – in your own unique style.

## 5. "One Company" Customer Experience Culture



### #5 Leading and Delivering a "One Company" Experience across all operations *Internal culture, engagement, and acculturate service expectations*

This part of the work is about leadership and organizational dynamics and about communication. The companies that are most successful at the customer experience work address the work across the silos as well as how leaders enable the organization to work together.

This is where we address the human issues that are so critical to continuing to hold a place in customers' hearts. How are leaders enabling the organization to work? How are decisions made? What are people rewarded and recognized for?

This begins with creating simple and clear actions for Leaders, the middle and the frontline for working together. For Leaders: how do they get rid of the roadblocks? For the Middle, how do they work together across the silos and get rid of some of their own policies and procedures that they "own" but that get in the way of a united experience. And how do they make decisions as they do their work? For the front: how do we hire folks congruent with our core values, how do we enable and train them to bring the best version of themselves to work. And how do we involve them in the customer experience work?

There's a lot here and this part of the work is frequently the "heavy lifting" of getting traction. Often I lead workshops for the organization to help them get on the same page. Then as usual, pass on the materials and slides so that these conversations can be continued throughout the organization.

To get started, I suggest these simple action items you can go do tomorrow without spending much money. All it takes is passion, commitment and making this a priority:

- Call lost customers. Play those calls for everyone.

Have your execs call at least five customers who have left you every month. No script required, just the ability to really listen. Start the call by telling the customer how sorry they left your company, and then ask if they could explain what happened. Then, stop talking...just listen. These calls will get the voice of your customer into the ear of the people who can make change. And there is nothing like these calls to bust through how we usually think of customers, as survey data or retention rates. Get customers' permission to record those calls and play them and talk about each experience that customers were disappointed in.

These will get you fast traction and a culture boost as folks in your organization will see that execs are committed and talking about customers personally and the experiences they are having.

- Be a customer

Commit everyone in your organization to do one thing that you require customers to do once a month. Buy a product on your site as customers do. File a claim as they do, redeem a coupon, etc. Then talk about the process. Fix what doesn't make sense and makes you wonder why a company would treat customers in that manner.

- Connect with the frontline

At Lands' End every few months, we brought in about twenty people from all the frontline operations; the phone folks, pickers and packers from the warehouse, etc. and had them sit in a circle around our President. They talked, and we listened and took notes. We believed their version of how they were treated and how customers were treated and we made changes based on what they said. Try this. You don't have to do exactly this, but make sure that you actively listen to the frontline, and most importantly believe what they have to say – and take action.

- Do customer math, and talk about lost and gained customers in every meeting

Initiate your version of the bowl of customer marbles and talk about it at every meeting. Relate that gain or loss of customers to what has been heard in those lost customer calls, to what the frontline is saying and to what you are experiencing as a customer of your company. Then talk about it all as experiences – and start driving accountability in cross functional teams to fix experiences – not silo problems.



## About Jeanne Bliss

Jeanne Bliss began her career at Lands' End where she reported to founder Gary Comer and the company's executive committee, ensuring that in the formative years of the organization, the company stayed focused on its core principles of customer and employee focus. She was the first leader of the Lands' End Customer Experience. In addition to Lands' End, she has served Allstate, Microsoft, Coldwell Banker Corporation and Mazda Corporations as its executive leading customer focus and customer experience. Jeanne has helped achieve 95% retention rates across 50,000 person organizations, harnessing businesses to work across their silos to deliver a united and deliberate experience customers (and employees) want to repeat.

Jeanne now runs CustomerBliss ([www.customerbliss.com](http://www.customerbliss.com)), an international consulting business where she coaches executive leadership teams and customer leadership executives on how to put customer profitability at the center of their business, by getting past lip service; to operationally relevant, operationally executable plans and processes. Her clients include Johnson & Johnson, TD Ameritrade, St. Jude's Children's Hospitals, Bombardier Aircraft and many others.

Her two best-selling books are *Chief Customer Officer: Getting Past Lip Service to Passionate Action* and *I Love You More than My Dog: Five Decisions that Drive Extreme Customer Loyalty in Good Times and Bad*.