

How to Develop a Successful Customer Experience Strategy.

How to get started on your path to increased customer centricity.





A successful customer experience strategy starts with an aspiration centred on what matters to customers and empowering frontline workers to deliver.

Almost every successful organisation recognises that it is in the customer-experience business.

Knowing that your organisation is primarily in the customer-service business is not, however, enough to achieve organisational change. To build internal momentum for initiatives to develop a unique customer experience, an organisation must understand how it helps its customers achieve their jobs and enable them to move on with the rest of their life.

The conviction and shared aspiration that stem from understanding the customer experience you want to deliver not only inspires, aligns and guides future actions, but also brings innovation, energy and a much needed human face to what would otherwise be some strategy document.

Customer Experience maturity across organisations varies widely not only in aspiration but also delivery. For some organisations, this transformed experience represents a real step change. For others, the aspiration may, at least in the short term, require only more modest changes.

Either way, the aspiration will translate into an overall mission and ultimately, into guiding practices for frontline behaviour.

One watch out: it is very easy to err by aiming too low. In our experience, looking at historical performance and at whatever helped satisfy customers in the past can often make marginal tweaks seem good enough. Understanding the fundamental wants and needs of customers is a crucial step in determining what a great experience should look and feel like for your customers.

Building a customer experience (CX) Strategy is much like starting any major project you embark on. While initially, you might not have a clear plan and the right resources to pull it off from day one, it requires some building blocks and a plan to get achieve your goal. And while the process might take months to complete, having a clear vision for the outcome you desire—and the right approach to get there—is what is important.





Just like a new product or technology platform, building a CX strategy is something that requires a number of elements, resources and commitment to see it through.

When we work with organisations across Australia, we are asked one question more than any other:

Is there a step by step plan that we can implement so we can become more customer centric?

And the short answer is of course! Like any other major project, there are a set of steps that you can follow that will ensure you and your team are able to deliver much more customer centred services.

The longer answer is that combined with those steps are 5 Practices that need to be embraced and developed within the organisation to support the ongoing delivery of experiences your customers will love.

Sadly, even though putting in place a technology platform or process to hear what your customers think is important is a meaningful first step, it alone won't deliver the improvements that we imagine you might be looking for.

What it will do is give a strong starting point to begin to truly understand what makes your customers tick and what you as an organisation need to focus on to deliver your Customer Experience Vision.

The journey to customer-centricity begins with a clear understanding of what it means for an organisation. It's not simply about becoming aware, but also taking steps towards achieving this goal through commitment and passion - all while melding people, processes, culture, technology analysis and tracking action in order create lasting change within your organisation.

And every CX vision must be based on a robust strategy that builds out 5 distinct Practices.



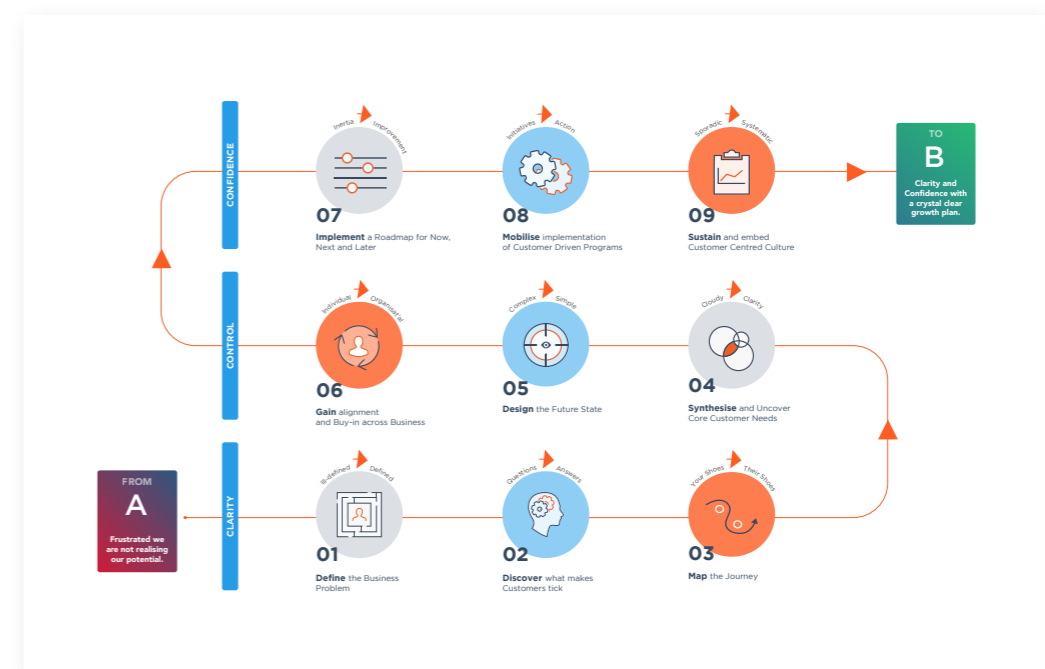
Placing Customers at the Heart of your Strategy

Consider this guide a blueprint for you to build your own Ideal CX strategy, whether it's starting from scratch, a marginal improvement or a full transformation. Remember, every organisation has its own unique challenges and hurdles to overcome; however, they should not be viewed as deterrents, but as an invitation to rethink and ultimately shape your organisation's promise to your customers, employees and all stakeholders.

From first steps to long-term goals, the following are the Practices—the foundation— of a successful CX strategy.

Becoming customer-centric doesn't just happen. It begins with a Customer Strategy, a vision which, over time, becomes a fully-immersive reason for and way of conducting your business. It's more than an initiative—it's a business discipline—a way of life within your own organisation.

Following are 5 key Practices that serve as building blocks for infusing customer centricity into your organisation and its people. You will also find a more detailed 9 Step Plan at the back of this brochure. Once you have read through the practices, use the Detailed Step by Step Plan to improve your customer's experience.



Understanding & Insight Practices

The Understanding & Insight discipline is a set of practices that creates a consistent shared understanding of who your customers are, what they want and need, and how they perceive the interactions they're having with your company today. In other words, it's the thing that replaces everyone's best guesses about customers with real, actionable insights about customers.



Practice One - Understanding & Insight

Gain a baseline of Customer Satisfaction

We all have to start somewhere. Knowing where you are now can help guide your future success, so it's important that the foundation for this journey has been established with some initial benchmarking and customer research. The data from this analysis will give you a clear understanding not only on how customers perceive your service delivery but also how satisfied they've become over time. If we want to deliver on our service promises then there is no better way than by knowing how people feel about their experience with you - both good and bad moments!



Capture feedback at multiple points in the journey

The customer journey is complex and multifaceted, which means there are many different touch points to interact with customers. It also means there are multiple moments when we can either let down or delight our customers. Collecting feedback at each of these key moments will help you create a more meaningful experience for your clients; it also ensures that the business has an accurate view into how its customers interact once they're already part way through their interactions with you.

Strategy & Vision Practices

The Strategy & Vision discipline is your game plan. It's a set of practices for crafting and aligning your Customer Experience Strategy with your organisation's overall business strategy and then sharing that strategy with employees to guide decision-making and prioritisation across each department within the organisation.

Practice Two - Strategy & Vision

A Clearly Articulated Customer Vision

When you have a clear vision, it's easier to stay motivated and follow through. It also helps attract new talent because they know what they are buying into and what working with you and your team will look and feel in the future.

A Vision should be simple enough that everyone within the organisation understands its meaning—from employees who work on the front line all the way to other operational staff and ultimately where customers can see how committed you are to delivering quality services and experiences according to your promise/guiding values.



Develop Valuable Customer Strategies

Use Customer Insight to guide your Service and Operational decisions. Design your products and services based on the feedback you gained during customer research and update your service delivery and processes to regularly adjust for changes in your customers' needs. All decisions, from communication strategies to training strategies and environmental initiatives, must be in line with the identity and preferences of your customers and the reason they engage with your Services.

Design & Delivery Practices

The Design & Deliver practices help organisations envision and then implement customer interactions that meet or exceed customer needs. It spans the complex systems of people, products, interfaces, services, and spaces that your customers encounter in retail locations, over the phone, or through digital media like websites and mobile apps.

Manila
Key Themes

Customer service isn't up to standard

NO Friendly introduction

NO active listening

CSRS say 'Bear w me' ALOT!!

Constant transfers - hand-balled

not personalised
don't call customers by their names they say ma'am/sir

experiences are inconsistent for customers

Customers always put

Customers get frustrated

Practice Three - Design and Delivery

Ensure all your people are involved

To become more customer-centric means becoming infused across your hiring, training and coaching to build a culture that is focused on the needs of customers. Your Customer Vision should help define specific traits for employees in order to deliver on the promises you make - whether that be via business policies or across your communication. It's not enough to just focus only one area when creating this type of approach because there are many different aspects involved with having an effective organisation wide approach.

Changing the way that you hire staff can have a huge impact on their ability to offer customer-centric experiences. Organisations need to shift from focusing solely on skillset requirements and focus more towards personality fit and attitudinal aspects, which will allow you to train employees in specific tasks while also allowing your wider teams to meet ongoing expectations for delivering an improved Customer Experience.



Combine all the key parts for success

When it comes to creating a organisation culture, few organisations were born CX-centric. Most organisations need to adapt their organisational structures and fit with emerging capability matrices to deliver a consistently good experience; this means aligning your teams under one vision while also having the right processes that support the delivery of improved experiences.

Measurement & Prioritisation Practices

The Measurement & Prioritisation discipline is a set of practices that let organisations measure customer experience quality in a consistent manner across all departments and deliver actionable insights to employees and stakeholders. This is how you put customer-experience metrics on par with traditional-business metrics, such as finance and operational delivery.

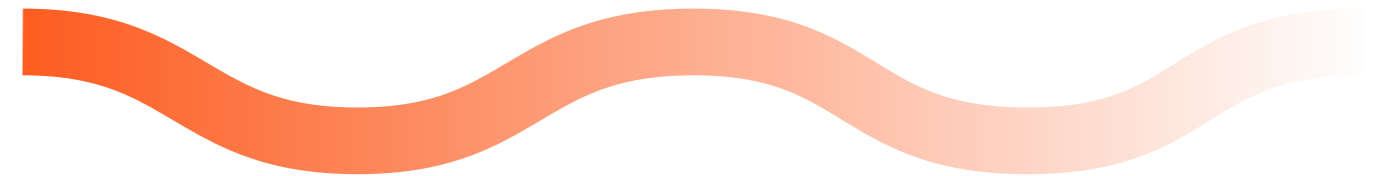




Leverage all the skills in your Organisation

When organisations operate in silos, their initiatives falter. Departmental and data-related issues can be problematic for the organisation as a whole because each department has its own perspective about what needs to change or improve with how things work now. And too often even though everyone believes they are doing the right thing, they are often working against one another which ends up making these problems worse for customers instead of better.

To address this challenge, when representatives from all relevant parts of the journey are included in the design and delivery of services, the unique skillsets solve issues more efficiently; cross functional groups also provide an essential balance between everyone's expertise so teams don't either feel left out or become dis-engaged.



Leadership & Culture Practices

The Leadership & Culture discipline is a set of practices that help organisations manage the customer experience in a proactive and disciplined way. If your customer experience strategy is your game plan, then the Leadership & Culture discipline supplies your referees and your rule book which creates a system of shared values and behaviours that focus employees on delivering great customer experience.

It does this through a mix of assigning responsibilities and changing business processes. You might think of it as the way you shape what your employees do when you're not in the room.



Practice Five - Leadership & Culture

A Committed Leadership

If you want your organisation to become more customer-centric, then it's critical that the senior leadership is helping in driving this conversation. Research has shown that what makes an organisation capable of leading with CX; is having a committed executive who can lead and set the direction for their respective teams. Along with teams who are aligned to the customer vision and understand what role they play in contributing to improving it.



Remember to communicate your message again and again

Internal communication about your customer experience strategy is key to ensuring that it's effective. Begin by crafting a vision, announcing this internally within the organisation so everyone knows where they are headed and what their goals will be moving forward together!

Then find ways and channels to repeat the message and keep repeating the importance of customer and share examples of how staff can deliver better experiences on a daily basis. Sharing win and positive human and business benefits helps your strategy gain momentum.

Step by Step Guide



For the Detailed Guide

[DOWNLOAD HERE](#)



Understand Your Customers and Grow Your Business

Proto Partners

Get in touch to find out more about how to
transform Customer Thinking into Customer Growth.

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