



IMPROVE YOUR CUSTOMER EXPERIENCE:

An Action Plan for CX Success

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Introduction

Improving Customer Experience is widely cited as a number 1 priority for companies in 2018, as companies wake up to the customer experience as a key strategic priority for continued business success.

While many managers are able to pick out various aspects of the customer experience which could be improved, turning these thoughts into a successful process which guarantees results is often trickier.

With that in mind, we've created a complete eBook which lays out all the steps you'll need to take to build a successful customer experience improvement program for your business. This eBook contains best practice tips from the CX field, encompassing methodologies like Six Sigma to ensure your pathway to customer experience improvement is clear and straightforward.

This eBook contains the following chapters:

- [10 First Steps to Improve Your Customer Experience](#)
- [How to Set Goals & Build a Strategy to Drive Customer Experience Improvement](#)
- [Customer Experience Mapping: How to Create Smoother, More Effortless Journeys](#)
- [Customer Experience Quality & Training: How to Build a Winning Framework within Your Organization](#)
- [How to Use Continuous Improvement Strategies for Customer Experience Improvement](#)

This eBook also includes a template to use for your customer experience mapping sessions, which ties in with the chapter "Customer Experience Mapping: How to Create Smoother, More Effortless Journeys".

10 First Steps to Improve Your Customer Experience

According to CX Network's [2017 Digital Marketing Trends Report](#), customer experience ranks first as the most exciting opportunity for businesses for the third year in a row. At 22%, it is ahead of content marketing (15%), mobile (13%), personalization (11%) and social marketing (7%).

It is no surprise that customer experience ranks highly. Studies have shown that companies that follow through with customer experience strategies achieve increased revenue, higher customer satisfaction rates and fewer complaints in general.

Customer experience is described as the sum total of all the experiences and interactions that the customer has had from your business relationship.

It is very different from “customer service” which is focused more on the way a service is delivered before, during and after the purchase. The two are however tied very closely together and are somewhat interdependent.

Generally speaking, a customer's first point of contact with a business is either via the phone, email or one-on-one interactions. This should be the first place to execute your customer experience improvement program.

In order to develop a successful customer experience strategy, you first have to have a vision, understand and relate to your customers, get real-time feedback while also managing employee responses and following a preset framework.

Having an organizational framework that is aligned with customer experience is important because all the employees have to chip in. Knowing your customer allows you to select the best communication channels to use for better CX.

Here are 10 first steps to improve your customer experience.

1. Customer-Focused Culture

The first step is to create [a culture that is focused on customer satisfaction](#). The perspective of the customer has to be factored into the company vision and instilled into your company's employees if you stand a chance of succeeding in your CX efforts.

The best way to do this is to create a list of statements that will serve as guiding principles, and focus all staff around these.

Zappos, for instance, use their core family values which have been ingrained into their culture to deliver exemplary service, show humility, and welcome change.

Starbucks also carries out several customer experience seminars where employees are trained on etiquette, addressing customer complaints and standard responses to use.

Both companies have benefitted from having a customer-oriented culture, both in terms of revenue and customer loyalty.

These guiding principles will drive the organization's behavior when they are embedded into every employee, ensuring that decisions made are customer-friendly and that no action takes place without a deep consideration of how it will affect your customers.

2. Know Who Your Customers Are

Second, know who your customers are and address their specific needs to improve your customer experience.

Not all customers have the same needs and you can find many different types of customers contacting your contact center – all with different desires and expectations.

Knowing customer demographics like age, race, and residence is not enough – think more widely to consider the ways they'll be using your products and services, their expectations of service from you, and the ways they prefer to interact with you, for example.

With a deep understanding of who your customers are, employees should empathize with your customers and view the service from their point of view, enabling you to deliver better experiences across the board.

One way you can do this is by creating customer personas with a name and personality attached, and getting your staff to contribute to this. For example, "Fridah is 29 years old and likes following a video tutorial," or "James, 44 prefers reading manual instructions on the website."

You should find that simply by humanizing your customers through overt profiles and challenging your staff to think more deeply about their needs, your staff start to think less about your products and services in isolation, and start to think more about how they fit your customer base.

3. Mobile Customer Support

Mobile phones are the fastest adopted technology of modern times, and in the U.S [more than 91% of adults own a cell phone](#). [Out of these, 63% use their phones a few times every month to search for products and customer support](#).

But many mobile interfaces are badly designed and difficult to use, even when website content is optimized for mobile viewing. This results in customers calling the company for simple queries they could have solved themselves, causing contact centers to become flooded with queries.

Companies using customized call tracking and chat software can benefit from built-in integrations that make support resources available for mobile viewing. This greatly improves customer experience since the customer can get their problem solved on their mobile phone.

4. Live Chat

[Live chat is crucial](#) in improving customer experiences as it offers a real-time channel to find solutions for customers without having them leave your website.

Younger demographics especially prefer live chat over phone interactions, with more than 56% of people between 18 and 34 preferring live chat.

Live chat is especially popular among online retailers who don't want to let customers slip away if they're the least bit interested. But nowadays, live chat is not restricted to eCommerce, or to simple text-based messaging. Some providers allow co-browsing, where the customer care agent takes temporary control over the user's browser and provides technical troubleshooting or directs them to pages where they will find resources. Not to mention the influx of audio/video chat services, integrated knowledge bases and Chatbot services.

Live chat can also boost business operations by collecting contextual information that tells the agent what pages have been visited before and which products have already been viewed. This

metadata can be used to improve sales and marketing efforts, as well as improve technical troubleshooting for support staff.

5. Social Media Support

Social media is not just for individuals. Many of the biggest brands use it as a way of communicating with the customers in a more customer-centric way.

Companies can share interesting content and answer questions from customers on social media platforms. Also, by asking interesting questions, the marketing department can get more customer insight which is a crucial step in developing a customer experience strategy.

6. Self-Serve Tools

Self-service portals are doubly useful for companies because they can improve customer experience and increase the company's capacity by reducing workload.

Customers who have experienced a negative encounter with a call center will prefer the self-service portal. Younger customers who expect instant gratification, and will lose their marbles if their customer care call or live chat goes wrong, are often better off with self-help to stop queries in their tracks and provide support instantly.

With dissatisfaction rates standing at 57%, according to Forrester Research, it is a great CX strategy to provide self-serve tools. Empowering customers to take matters into their own hands can improve their customer experience by itself.

Bear in mind too that customers are very informed about the product even before they talk to the salesperson, and a self-serve portal is reassuring to them.

7. Suitable Channels for Your Customer Base

Part of providing a remarkable customer experience is to [communicate to customers over suitable communication channels](#). Gone are the days when you only had to call customer care to get assistance.

Nowadays, you can interact with customers over text, email, text message and social media depending on what they are comfortable with.

For instance, people above 40 could prefer calling while a younger demographic are going to enjoy the experience of connecting over social media.

Consider your industry, too. If you're working in a very formal professional industry, communication by phone call or even post might be more appropriate for communications than social media.

No single interaction medium fits all, and you will need to experiment to find out which fits the bill for your customers.

8. Have Someone Responsible for Customer Experience

Customer experience is often a multi-disciplinary effort, overlooking a myriad of departments including customer service, marketing, sales, product and so on. A customer experience manager or CXM is the link between the customer and the company, and the person who helps coordinate CX work across these different departments.

A CXM's role is to engineer the product's life cycle, from the customer's perspective, from beginning to end. Having someone to be responsible for customer experience can help consolidate efforts from different departments towards one common goal.

The CXM is responsible for all customer engagement tasks and comes up with relevant content for each target market. This exposes him/her to customer feedback that in turn is used to steer the product in the right direction.

When it comes to redesigning a product or service, the customer experience manager provides insight in the formulation of such a re-launch. The CXM then follows the product to the end of its life cycle and maximizes profits before pulling the plug on production and distribution.

9. Be Able to Research and Gather Data

Conducting research and data collection is crucial to the customer experience.

When customers call your company, they expect a certain quality of service. To win them over, you need to deliver above average. Customers have a higher likelihood to pay more money if the customer service they receive is exemplary. A recent report from ICMI confirmed that 69% of customers will do that.

Exceptional service doesn't happen by accident — you have to conduct extensive research and gather feedback from the customer to establish their needs, wants and expectations, and to gauge where you can deliver more. Not only is data important in the formulation of a customer experience strategy, data will also be needed to measure results.

This brings us to the next point:

10. The Ability to Benchmark and Evaluate

Are the processes, team-work, and technology paying off? Without measuring the ROI of customer experience, all the efforts will be futile.

To come up with the best strategy means trying out different things and being able to collect data will ensure you know what works and what doesn't. One way to measure the effectiveness of a strategy is to ask "Would you recommend this service to a friend or relative?" You can use a 5-point or 10-point scale to rate how happy or unhappy they were with the service.

Customer experience is the new battleground, and prioritizing it will give you an edge over your competition. But there needs to be a common vision, shared and ingrained in all the employees.

This will take some time, but when the right values are instilled into the company culture, it will be a huge payoff. Remember to benchmark and analyze the methods you use to ensure you are getting business results. A customer experience campaign can be costly, but you can profit from it by closely monitoring results.

How to Set Goals & Build a Strategy to Drive Customer Experience Improvement

Every company out there is trying to be more customer-centric, and the race for an excellent customer experience is heating up. Nowadays, having competitive prices and bombarding customers with advertisements and offers is not enough. Customers are smarter than before, and most of them already know your products and services intimately, based on online research or referrals, before making a purchase. These enlightened customers demand a certain quality of interaction and service from your company.

Creating a positive customer journey — from the first interaction (calls, live chat, emails or social media) to the purchase and even after the sale is made — is paramount if you want to attract and retain customers.

Numerous studies have shown that customers are willing to pay more money for good service. Therefore, any company trying to improve their customer experience should follow a defined plan to adopt a strategy that is congruent with their customer expectations.

Here is a detailed step-by-step guide to setting goals and strategizing for customer experience improvement.

1. Set Clear Objectives

The first step to improve customer experience should be to [ask yourself what exactly you plan on accomplishing](#).

Nine out of ten managers confirm that customer experience is a strategic objective for increasing sales and revenue. However, most managers do not ask what the end goal is before engaging in a CX improvement project.

A clear understanding of your business objectives is required. After identifying these objectives, you should identify who will be affected, and effectively prioritize and segment these people.

For example — identify which customers will be affected, what importance do each customer group have, and set out why they need a CX improvement. Other people affected include the employees on the frontline, for example, call center agents and sales representatives.

Here are some examples of objectives:

a. Business Objectives

Some of the business objectives you can use include customer retention, customer satisfaction, product purchases, purchase volume, purchase frequency, products returned, [the number of dissatisfied customers](#) and revenue.

These objectives allow you to evaluate the effectiveness of your customer experience strategy to convert into business results. They should be quantifiable and measurable.

b. Customer Experience Objectives

Examples of CX objectives include; giving customers more control, creating partnerships that improve customer experience (e.g. collaborating with a payment or shipping company), identifying target markets, increasing responsiveness and so forth.

Certain pitfalls must be avoided in this step, such as accounting for insufficient customer data, lack of business data and avoiding the assumption that all customers in your target group have the same views.

2. Understand Customer and Market Perceptions

Customer experience improvement is centered on the perceptions of the customer, not the business.

In order to improve CX, you should [understand the customer's idea of an ideal interaction](#). This includes the needs at every stage of the CX life cycle, interactions with your business and the difficulties they encounter. The CX program should be from the customer's perspective, which can be achieved by:

- Collecting customer experiences and views
- Identifying gaps in the customer experience
- Conducting internal workshops
- Mapping the customer journey
- Conducting customer, market, and employee research

Failing to include customers and stakeholders at all levels will be detrimental to your customer experience improvement efforts. It should be noted that the right customers should be involved, for example, the customers in your target group according to age, gender, location and so forth.

3. Developing the CX Strategy

Now that you know your objectives and have carried out the research, it's time to develop a strategy that will guide your customer experience.

This phase involves planning a strategy that consistently meets customer expectations or "ideal experiences." When developing your strategy, you will understand what resources are required, the time it will take and the specific activities you need to carry out changes.

Prioritize activities and allocate them to employees. It is also imperative that you start instilling a customer-focused attitude among employees through workshops and training, as well as ensuring your own stated values and behavior role-model what you want to achieve.

Here are some activities to consider:

- Define the strategy
- Create business cases and situations
- Identify gaps in the current CX strategy
- Get buy-in from executives by involving them in the project

The strategy should be tied to your brand and customers should associate your brand with the experience.

Involving executive management and staff is crucial. From your objectives, you should outline the expectations of your project, which employees can use to monitor progress and achieve the desired customer experience.

4. Set Quarterly Milestones that Are in Line with Objectives

This is an extension of the strategy development phase. Setting goals to be achieved quarterly will motivate employees and keep them focused. These goals will also be a yardstick to measure the success of your strategy. The achievement of these goals has to be tied to the overall

objectives outlined in step one. Using our business objectives, you can develop some questions such as:

- What can we do to reduce the number of returned products to >5% this quarter?
- Which strategy can we use to increase how frequently existing customers buy our products?
- How can we reduce delays to customer calls and increase responsiveness this quarter?
- What actions will improve our customer satisfaction ratings?
- What initiative can help increase customer retention by 1% this quarter?

These questions can be used to measure up against the quarterly goals.

Progress should be reviewed constantly and in a systematic manner. Team meetings, for instance, should be used to monitor progress and individuals should be assigned activities that will help in achieving the goals. Also, outline progress indicators which can be reviewed in periodic meetings.

5. Design Customer Service Protocols

Guided by the ideal customer interaction and the CX strategy, develop a protocol for customer service that will consistently offer value over the long term.

Remember that these protocols will differ with customer groups because of their different needs. Developing this framework will help you create positive touchpoint experiences that customers can come to expect from your brand. The activities to be carried out in this step include:

- Designing [specific customer experiences that meet customer expectations](#)
- Defining metrics and key performance indicators
- Create a framework to outline priorities
- Map out an implementation map and journey map

- Redesign current processes and services

One way to do this is to involve employees (especially those who interact with customers) in role-playing activities, or by creating a persona of a customer.

For example, Juliet is 26 years old, does her shopping online through her phone and uses the live chat feature for customer support, while 44-year-old John collects coupons from his mailing list to shop at your store, and prefers physically visiting your customer care desk.

This will help create a model for interacting with the two completely different customers and help you to deliver their ideal experiences.

Apart from this, your protocols should outline the activities that happen behind the scenes to create the customer experience. Interdependencies will be uncovered and the interaction with people, technology, and touch points will be smoothed out as a result.

6. Implement the CX Strategy

Next, using the material from the previous step, implement the customer experience strategy, starting internally.

This means training employees, redesigning systems, establishing internal communication channels and aligning rewards with the achievement of set goals.

Implementation is often time-consuming and resource-heavy because all staff must be involved. Executive management needs to support the initiative and lower tier employees need to be shown the importance of the initiative.

Additionally, employee rewards must be tied to goal achievement so that they can support the CX strategy. Customer experience will be driven by the customer-centric organizational culture – it's a win-win situation once you have your program off the ground.

This exercise can also help to bridge operational gaps that hinder customer service, like departmental communication barriers.

Activities included in this step are:

- Planning and executing internal communications

- Training
- Improving touch points and customer interactions
- Empowering employees to offer insight and ideas to improve the strategy
- Testing the strategy on preselected customers

7. Monitor the System and Make Improvements

After delivering the system to the customer, the company should monitor how effective it is in improving the customer experience. It will take some time to measure effectiveness, and you should compare the results with internal goals and metrics.

Customer feedback is very important and you should listen to customers to know where the system is failing. This can be done by measuring customer perceptions after they are introduced to the new system.

Other metrics to measure progress with are external metrics, monitoring your competition's customers, and listening to employee feedback.

You should also compare the customer experience between different customer groups and make specific improvements to the affected areas. The following activities can help in making improvements:

- Gather customer experiences from the new system
- Evaluate its impact on business objectives
- Track and monitor performance using KPIs
- Collect and act upon customer insights

Continuous improvement is required after this stage too, since market forces are dynamic and the customer's idea of an "ideal experience" can change over time. Therefore, it is important to continually monitor the customer experience and act on data collected.

Most managers, when tasked with customer experience improvement, look to create a new strategy that will radically change the way they do business. However, a more incremental approach as we've described ensures constant improvements, at a manageable scale.

Building upon the existing customer experience is the best strategy for success here, and by following these steps, you can ensure that you can plan, implement and track improvements to your service, helping you to demonstrate real business benefit.

Customer Experience Mapping: How to Create Smoother, More Effortless Journeys

Let's be honest, companies do not send out newsletters promoting massive “wins” and provide huge commission checks when an internal team manages to “save” a customer. Their focus is usually on growing the business, and that really only happens when you gain new accounts.

8 out of 10 marketers of global companies actually agree that [a much better strategy is retention](#), but their organizations are still focused on customer acquisition. However, costs to acquire new accounts are not inconsequential — nor is there any guarantee that the investment will actually lead to a new account.

If we look at the Cable and Telco markets as a case in point, they are shedding massive numbers of accounts on an almost daily basis due to residential homes pursuing cord cutting strategies over long-term contracts. While cable operators employ “retention specialists,” these are generally in place as a last resort. These companies could be better served by planning out and delivering services that their customers want, and aiming to deliver them in a smoother, more frictionless way.

In this article, we'll be exploring both the process of customer journey mapping and customer experience mapping, explaining the types of steps involved for each. First, let's go through what a journey map is and how to complete one.

What Is a Customer Journey Map?

The sales cycle is a well-known and long used tool in business. It takes a customer from prospect all the way to paying subscriber and tries to account for all of the different requirements and deliverables along the way. The focus in the sales cycle is very much on overcoming opposition and conversion.

A [customer journey map](#) is similar, yet different. The journey map itself is a simple representation of all the places where a customer might come into contact with your company. The focus can be very specific (a particular group, team or service), or more generic and company-wide.

A key point to keep in mind with journey mapping is that the more touchpoints you have, the more complicated the map becomes. Because of this, it sometimes makes more sense to have smaller, more specific maps for individual services and products — although “cradle to grave” maps are also useful.

A journey map talks about the different questions and feelings that a customer has at each touchpoint. It tries to give an idea of what the intent of the customer is, and specifically, what they are trying to achieve.

There is never one single way to approach journey mapping. Maps can look radically different from organization to organization, and even from team-to-team within the same organization. The important thing is not HOW it looks, but rather WHAT it does — namely, giving you a quick and easy way to understand how the customer feels at each stage.

Continuing our conversation about the cable customer, a journey map for them would look something like this:

- Customer receives information in post/mail or in person at shop or via a television advert about cable services & new promotion/deal.
- Customer contacts cable company to get the deal and is initially shocked at install fee, but based on monthly rate, agrees to go with company for service.
- Internet cord-cutting services and disrupters like Plex/Netflix/SlingTV are launched or made available in local market. Customer prices out services and packages based on “special new customer rate,” but finds price is still better with cable company.
- Special rate promotion expires, customer contacts company to check prices and offers, and is shocked to find the price has almost doubled! Attempts to negotiate a better rate as an existing customer and is transferred to a Tier 2 agent who says there is nothing that can be done, but offers 20% discount to stay with service. Customer agrees but is disgruntled and starts to complain to friends and family.
- Customer calls back again when next bill arrives... along with another letter from the SAME company offering an EVEN BETTER deal for NEW customers ONLY. Customer is now incensed and wants the same deal.
- He is told this is impossible and is transferred to a “retention specialist” when he starts talking about cancellation.

Retention specialist informs him that by taking advantage of the 20% discount, the customer is tied into a 6-month term or would have to pay a penalty fee.

- Customer does the math again and realizes that by canceling and moving services to another company, he would still be further ahead, even after paying the penalty fee. Customer leaves the company and moves all of his services away — including Internet and Mobile phone services, causing the company to not only lose the cable business but also the other bundled services.
- Customer tells many people about the issues and problems he experienced with the company and even writes a blog post about his experience which he shares with the world!

The above journey is actually a journey from my own experience... and yes, I did [write a blog post](#) about it!

As you can see on the map, there are quite a few different touchpoints, even for this simple example. At each stage, the company has an option in how they handle the interaction and [how they leave the customer “feeling” subsequently](#).

Moving from a Customer Journey Map to Customer Experience Mapping

While the journey map provides a simple interface for all of the touchpoints between a customer and a business, it does not really focus on these touchpoints from a specific point of view.

The [experience cycle serves to complement the sales cycle](#). Where the sales cycle focuses on conversion and the overcoming of opposition from a business’s point of view, the experience cycle focuses on the relationship between a business and its customer with the goal of fostering a long-term and ongoing relationship.

The experience cycle can be broken down into several key milestones, as follows:

1. **Connection** — this is the first opportunity that a business has to make a “good first impression” on a potential customer.
2. **Exposure** — this is where the customer learns about what is and isn’t possible with the product or service, even if only in a theoretical manner.
3. **Experience** — now the customer pushes the boundaries of the product or service. They test out and use all of the features, especially those that are most useful to them.
4. **Mastery & Activation** — at this stage of the process, the customer is an expert. They are also a strong proponent of the service and if their journey has been good, they can help to advocate its use in the industry.

Each of the touchpoints of the customer journey can be similarly mapped to a customer experience. If this exercise is done, it's possible to see how best to influence a customer in the appropriate direction. This frameshift changes the focus from a single "sale," to a series of relationships that yield ever-increasing returns.

Going back once again to our cable customer, let's take a look at some of the possible touchpoints that could possibly have been mapped differently to get a different outcome.

- The initial advertisement offering the promotion was enough to gain interest, so let's leave that alone. However, the promotion should include the installation fee so that the initial "sticker shock" is further reduced.
- The greatest benefits would be when the customer calls for the initial price adjustment, post promotion period. The fact is that they should:
 - Not have had to call in at all. While the promotional period is an incentive to attract new business, a follow-up letter near the completion of the period either offering an extension at the reduced rate or a significant "loyalty" discount for valued customers would have not only maintained the customer, it would have probably increased their Activation. Alternative strategies could have included offering a reduced discount for increased services. By ensuring that the customer does not have to call in the first place, you are moving in the right direction.
 - Alternatively, if they do call, have them immediately speak to the person that can best speak to them and offer them the "final deal" — no games, no phone tag, and no hidden gotchas.
- This focus on honest and improved service up front is what will move the customer to a true advocate of the service.
- A good product package, a good interface, a good support service, and other well-executed touch points enable a similar cycle of experience.

Tools to Create Your Journey

While the ideal goal is a lovely graphical representation of all of the steps that a customer takes from Point A to Point V (with stops along the way at Points M, Q, and Z), you do not have to start with pretty pictures, videos, and storyboards.

Spreadsheets might not be the sexiest tools out there, but they are really simple, easy to use and they are a tool that everyone is reasonably familiar with. Start with a simple Excel sheet to plug in each touchpoint and the teams/processes involved. Remember, it's just a tool to help you get a handle on how your customers are interacting with you.

The [goal of your map is that it needs to be customer focused](#) and from the customer's perspective. Ensure that the story remains front and center in the mind of everyone viewing it. You can always get a designer to produce graphics afterwards.

Building a Map

Whenever you're building a customer journey map it's important to not only include the key stakeholders, but also ensure that the right touchpoints are being included.

With your stakeholders, focus on collaborative sessions where everyone is involved in the actual data gathering, map building, and analysis process. Ensure that a "touchpoint inventory" is conducted to gather all of the different areas where customers interact with the company through their lifecycle, and continue interviewing stakeholders to ensure that the inventory is complete and comprehensive.

Start small — [focus on a specific application or service in its current state](#) versus looking at the customer from cradle to grave. Each of these individual scenarios can, at a later stage, be added to a larger framework as you continue building your maps throughout your organization.

The Journey Continues

You now have some idea of how to build a customer journey map and how it ties into customer experience mapping. The key concept to realize is that customer interactions build on each other. If that is understood, then the rest comes somewhat naturally.

It is very important to realize that [a journey is not always in a straight line](#). In the sales cycle, for example, someone might jump straight from awareness to purchase, whereas others may spend days, weeks and even years researching, price matching and comparing features and benefits.

Similarly, with customer journey mapping and experience mapping, it is very important to try and look at all of the different interactions and interrelationships. What might seem simple and logical to a customer veteran might be completely obtuse to a neophyte, and it's important that your map takes all eventualities into account.

Customer Experience Quality & Training: How to Build a Winning Framework within Your Organization

Times are changing, and the way people make buying decisions is radically different from how it was a few decades ago.

Companies can no longer rely on having satisfied customers to ensure that they stay in business. Customers expect exemplary service, and offering anything less will turn them away. Satisfied customers do not complain — which is all very well, but it means you won't get crucial feedback. Their loyalty is also shaky, and they will leave when presented with a better offer.

The loyal customers who are enthusiastic about your brand have been found to [frequently complain in an effort to help you improve](#) and are the most likely to recommend friends. But in order to get customer loyalty in the first place, you need to closely manage customer experience quality.

[Quality management means proactively improving the customer experience](#) by researching the 'why' and 'how' of the customer journey.

Here is a framework you can use to manage the quality of your customer experience.

Building a Quality Management Framework

The following tenets are going to guide your customer experience quality management framework.

1. Outside-In Thinking

The first step in the framework is to adopt an outside-in mentality where the business is focused on the customer instead of the product, i.e., it's truly customer-centric. Customer experience is often more powerful than other factors that can be used to increase profits, for example, lean manufacturing and product research, so it's worth paying attention to.

Start off by setting up a customer advisory panel whose responsibility is reaching out to customers. The panel will evaluate the business processes that work and those that don't. This will result in a performance baseline being established.

2. Hire an Executive Champion

Customer experience touches on different sectors of the business, and you should have an executive champion to manage it all. Improving customer experience will involve a cultural change within the organization. The CX executive champion should be credible, command authority and be visible to the whole business, not just one geographical area.

Think of him/ her as the beacon of customer experience. The executive is also responsible for coming up with new customer experience strategies and interacts with different departmental heads. For maximum capacity for positive change and to send a strong message about the importance of CX in the executive suite, this person should report directly to the CEO.

3. Define Quantifiable Objectives

You can't improve what you can't measure. Quality management requires measurable and clear objectives that will be used to calculate ROI.

Starting a [customer experience project](#) without the right goals will jeopardize the life cycle of the project. When the company has to make budget cuts, the CX project whose ROI cannot be clearly measured will be the first to be dropped. Some of the most common customer experience objectives, in order of popularity, are:

- Organic growth
- Customer retention
- Differentiation
- Acquiring new customers
- Operation efficiency
- Customer backing

You can use these objectives to measure and manage the quality of the customer experience. It will also help in planning and executing changes, investing in your strategy and calculating ROI.

4. Evaluate Your Company Culture

Company culture is very important when it comes to implementing a CX quality management strategy. If the culture does not revolve around customers, the company culture needs to be changed.

All of the employees should realize the importance of customers [and the benefits of satisfying customer needs](#). Otherwise, even the best strategy will fail.

Every employee should realize that successful businesses seek to satisfy customers and make a profit from that, rather than being in business to meet the bottom line.

Some employees simply don't have the patience and empathy to deal with customers and sort out their problems. This might need personnel changes or redesign of incentives and compensation to be in line with customer experience. Executive management can do this by carrying out recurring training for employees (more on training later in this article).

5. Define Business Processes and Customer Journeys

After getting the approval from top management and stakeholders, start executing the plan. Prioritize the business processes and identify process leaders, KPIs and customer journey maps. Use a scoring system for the business processes that are based on these four customer-centric measures:

- Responsiveness
- Convenience
- Reliability
- Relevance

Business objectives will help in defining a customer journey which aligns with customer interactions at every stage/ touch point.

The touch points follow a cyclical sequence that generally looks like this: Need > Research > Select > Purchase > Receive > Use > Maintain > Recommend. The customer journey is different from the customer lifecycle and can start at any touch point.

Creating the Customer Journey

Customers use a myriad of channels based on their needs and activities. In order to create a repeatable process and ensure quality management, you should create a customer journey.

They can differ according to customer groups, but they all have the same touch points. [Mapping the customer journey allows you to improve the quality](#) and value delivered at each touch point. But doing this without identifying the customer channels is akin to shooting in the dark.

Customer Channels and Customer Journeys

When you understand the relationship between customer channels and the customer journey, you can create a repeatable process capable of consistently producing the same results. Customers use different channels at different touch points.

Using the touch points indicated in step five, we can match channels with specific touch points. Channels used include web, mobile, live chat, social, self-serve, in-store, kiosks and call centers.

For example, a typical customer, Jane, uses the social channel on Need/ Research, Selects items using mobile, Purchases on the web, Receives the purchase in-store, calls the call center when in Use and Recommends to friends on social media channels. With these links uncovered, you can create a customer persona and outline customer objectives to establish activities at every point of the customer journey.

Fixing Customer Journey Issues

One major problem encountered by the customer experience managers is the difficulty in detecting problems in the customer journey. The only way to know when customers are experiencing difficulties is if they contact your contact center.

But for every customer who flags up an issue, there might be 100s more customers who don't say anything and simply move to other businesses. The cost of lost business therefore becomes very high.

Some common problems include difficulty in navigation (for example, broken website links) and payment problems. For the latter, you might receive many calls or chats to let you know that there's a problem, but the former will be harder to identify because few people will get in touch if they can't navigate to the product.

These inconveniences are barriers to conversion and make for poor customer experience. Here is how you can fix customer journey problems:

a. Customer's View

Certain software can be used to map out individual customer journeys on a website and play it back for review. This enables managers and staff to understand the experience through the customer's eyes, monitoring every click and page view. Issues such as non-responsive forms can be solved quickly to maintain quality.

b. Mapping Out Customer Frustration

Another way to deal with CX journey problem is to map out frustration. You can use analytic software to find the exact frustration levels at every point in the customer journey. Rising frustration at a certain touch point means customers are experiencing problems. This is effective as you can capture customer frustration outside of contact center complaints.

c. Respond in Real Time

Responding to issues in real time is a great way to deal with customer journey problems. The team responsible for customer experience should identify, quantify and then act on these issues as soon as they crop up.

d. Develop Cross-Channel Support

As discussed before, customers use different channels at different touch points. The customer expects that the company knows who they are, even when using different channels.

Furthermore, they expect the information entered through one channel is immediately available to all other channels they might use.

Companies suffer from this because departmental activities are often done in isolation, and systems often aren't joined-up enough to provide a single view of the customer. But using business processes and aligning them with specific goals produces a process whereby constant improvement in quality can be achieved. Cross-channel support requires you to use technology such as databases in order to succeed.

Training as a Part of Quality Management

Part of [delivering excellent customer service is doing it consistently and producing reliable results](#).

Customers like to receive experiences that are predictably good, regardless of what department they're dealing with, or where in their buyer's journey they are.

Training helps to achieve this by building competence to achieve repeatable quality. Through good training, employees also come to clearly understand their roles and responsibilities in providing value for the customer, through which a quality-centric culture in the organization can be created.

Create a plan before you start rolling out training programs by asking the following questions:

- **Who should receive the training?**

Conventionally, companies that adopt quality training often go on to offer every employee the same training. [A report by APQC on quality training](#) in organizations found that 56% of the respondents carry out training to staff involved in quality, while 44% of the group conducted these training programs for all employees.

Managers often think that by training everyone, a culture of quality will be cultivated in the organization. But focusing the training efforts on quality-related staff (and only those who want it) helps to get a better ROI from training programs.

- **What are the key training topics?**

Most organizations train their staff on quality management principles, auditing, tools and ISO standards. These values are far from the customer-related tenets like customer experience and Net Promoter Score.

The same report by APQC found that all the topics covered in training recorded financial benefits. On the other hand, companies that focused their training on customer related topics like Six Sigma, NPS, customer experience, and lean reaped better financial benefits.

- **Training Incentives**

Incentives have to be included in the quality training to motivate employees to complete these courses. Incentives can be monetary or emotional — for example, through receiving recognition.

It was discovered that companies which offer monetary incentives for their staff achieve little financial gain as compared to those who use emotional incentives. Consider what's really important to your staff as you create a reward plan.

Paying attention to quality is vital for companies who wish to build a solid customer experience. There's a myriad of tools out there to help you map frustration, get a clearer view of your customer, and improve on your current processes. Bolster a solid quality plan with a good training program and you'll start to see some great results.

How to Use Continuous Improvement Strategies for Customer Experience Improvement

In this day and age, all companies who want to get an edge over the competition must embrace customer experience continuous improvement as a strategy to ensure their customers receive great customer experiences.

Why? Well, the customer experience is a key ingredient to getting new business and maintaining customer loyalty. But delivering excellent customer experiences isn't something that you can measure one time and not look to improve. The reason for this is that customer expectations are constantly rising — and what's seen as exceptional service today, may not be the exceptional service of tomorrow. Businesses need to keep innovating and improving their service, or risk being left behind.

For all businesses then, it's essential to establish a continuous improvement process that will constantly improve the customer experience, helping to keep your customers delighted with your service, and helping to boost loyalty.

To help you to do this, we've created a customer experience improvement strategy based on the [Deming Cycle](#), a continuous improvement framework based on Six Sigma methodology. This cycle can be adapted to all situations where improvement is required, and advocates for an established process for these situations:

- **Plan** your change
- **Do** the change
- **Study**, or **check** the results of the change
- **Act** to improve the change further

Here are our steps you can use to build a management process which closes the loop and acts on customer feedback, all the while improving experiences for your customers.

Gathering Insight

This is an overlooked factor in creating a great customer experience which most companies take lightly, or don't often do at all.

While it might seem odd to launch a customer experience improvement project without hearing from your customers exactly what's critical to be improved, many companies fall into the trap of assuming they know what their customers want, without actually asking them. But [customers are the best information source available to any company](#) and should be your first port of call when identifying what needs to be improved.

Companies should put in place some methods of getting feedback from customers, ideally covering both qualitative and quantitative outputs which can then be measured against at the completion of the change project. This can be done using surveys, questionnaires and focus groups, for example. Customers can also provide meaningful information during interactions with your agents, and this kind of feedback should not be ignored. Ensure you provide enough of a feedback loop flowing from agents to management to capture and act upon this feedback.

Identifying Goals

Once you have a pool of feedback, you should start to see areas where you can make changes. Identifying clear goals for each potential change helps you not just to ensure clarity in what exactly needs to be changed, it also allows you to start assessing how you can measure the impact of those changes.

It's essential to build SMART goals here, to allow you to clearly manage your continuous improvement efforts, and ensure your entire team can understand exactly which changes need to be made. Prioritization of potential customer experience improvements is also important. It might be that you decide to improve areas first that are important or have a large potential impact. Alternatively, you might want to pick some small changes to push through your improvement process first, so you can notch up some "quick wins," and improve on the process as you move to making bigger changes.

Planning the Next Steps

Once a specific area for improvement has been identified, it's crucial to get all the relevant teams and groups aligned and on the same page. Internal "customer advocates" should be polled for opinions, but it's essential that the teams working on the solution(s) have a clear idea of the overall direction of the

change. This knowledge is critical in ensuring that the change project meets your goals, but is also a requirement in ensuring that the project remains in budget and scope.

Customer advocates should be involved throughout the process to ensure that the solution addresses the problems identified and is something that the customer will use. In addition, they can represent the voice of the customer in ensuring that the changes are delivered in a timely and appropriate manner.

DO!

The second phase in the Deming cycle (Plan > Do > Check > Act) is the actual “doing” or implementing of the project. If you’ve got all parts of the business (from front line employee to Senior Management) aware of the reasons and rationale for the project as well as the projected benefits, this is an easy step.

If you do not have that buy-in, approvals for budgeting and actual implementation might be difficult to obtain, so ideally you should involve key stakeholders early and often. At the front line, ensure that team members are bought into any change and make sure there are key milestones throughout the delivery cycle that make sense to everyone.

Have your own teams (especially those customer advocates) test the solution and have them try to “break” the solution so that you know its real limitations before it goes out into the field.

Monitoring the Project

While this is not always the case with hardware and software deployments where the deliverables are very clearly defined, experience projects are sometimes a little bit harder to fully scope out. It’s important then that the customer experience manager monitors the release of the new project to ensure that it is fully meeting the needs of the business and the expectations of customers.

Effective monitoring requires an understanding of the initial state and the new/desired state so that a comparison between the two can be made. Measurements assessing the ‘gap’ between these two states should be made at regular intervals, as services can change based on many different variables – time of year, sales volumes, holidays etc.

Clearly defined metrics need to be selected upfront to ensure that the measurement is relevant. These should be selected with a mind for customer needs, as what might be most important to your business, will not necessarily be as important to your customer. The goal here is determining how the project has

improved the customer experience, and not measuring efficiencies of the team or other internal statistics.

Improving the Project

Deming talks about Plan > Do > Check > Act as a cycle, not a one-time iteration.

Total Quality Management speaks to the fact that once you've reached the final stage, you start over again! You see, as you improve your services and business, customer expectations change and what was once "exceptional" becomes the norm and the expectation.

If you're aiming to continuously exceed customer expectations, it's essential that you're constantly coming up with new innovations and ideas so that you continue to improve your existing systems and tools.

As mentioned earlier, each of these projects can be small — the cumulative effect of multiple small fixes, however, can be something quite astonishing!

Control

Here, you can borrow another tool from Six Sigma to help you ensure your change projects aren't just successful in the here and now, but that changes made maintain in the future too.

The DMAIC framework is used in a multitude of different business areas in the same way that the Deming cycle we've already covered is used.

We've covered DMAI (Define, Measure, Analyze, Improve) in our previous steps as they overlap the Deming cycle quite closely. But the final step in DMAIC is the "C" which stands for Control, and this is something that the Deming cycle lacks.

Here you want to [lock in all those positive gains you've made](#). Continue monitoring your improvements, but ensure that there is a plan in place to revisit the project at a regular basis. Unfortunately, it is much too easy for employees to slip back into behavior that is comfortable and, in this case, contrary to your goal of improving the customer experience.

Important Questions to Ask in Improving Customer Experience

Customer experience involves many facets including customers, employees, organizational culture and so forth. Before taking on any changes, you need to know where you stand. The best way is to [ask important questions that will fall into three categories: customers, your market, and your product.](#)

1. Customers

- **Is it possible to spend more time with customers?**
Spending more time with them will help you to understand their needs better. Surveys, calls and personalized promotions can help you to achieve this. Data collected can be used to create new customer experience projects and improve your products or services.
- **Can customers be involved in creating better CX?**
Involving customers in the development of customer experiences can help achieve better results. A good example is of Doritos, who [asked their customers to come up with ideas for advertisements](#) which were played during the Super Bowl.
- **Can we turn data into insights for the project?**
Is the data collected useful and is it worth collecting? Make sure that you're not just collecting data for the sake of it — that data should always be in service of actionable insights.

2. Market

- **How can we assess the competition's customer experience strategies?**
If the competition is treating their customers well, customers will expect a similar experience from your company. Other businesses can hugely affect your own customer experience — plan and prioritize accordingly.
- **Is there a way to maximize industry data?**
Watching how customers interact with the competition can help in understanding the market forces in play and can be used to your advantage. Companies like Gartner and Forrester can help with enabling you to better understand data within your industry.
- **How can we reflect on our position against the competition?**
Periodic assessment of customer experience successes and failures, and what other companies are doing differently, helps you ensure that you can stay ahead of the

competition. But as your competitors launch new strategies, you'll need to ensure you can keep abreast of these as they occur.

3. Product

- **Is it possible to be a part of product creation?**

The customer experience manager should ideally be involved in product creation. This provides insight for aligning the customer experience to match your company's capacity.

- **Can we work more closely with product developers?**

Customer experience managers are the link between the customer and the company, so they should know what product developers can produce to better match customer expectations.

- **How can customers be involved in developing the product?**

Both developers and customers can benefit from this. The former gets a new perspective and insight, while the latter appreciate the work going into the customer experience.

Measuring ROI on Customer Experience Projects

Without measuring return on investment, customer experience improvement projects will be too expensive for many companies. The company needs to know what strategy is profitable to them so that positive changes can be made. [In order to measure ROI, you need to establish some metrics:](#)

1. Business Metrics

Before starting on the project, establish the business numbers you are going to use to measure the CX value. These need to be quantifiable to prove ROI.

One such metric is — will customers buy the same number of products or buy more if you give them a better customer experience? Others include the frequency of purchases made, products returned, size of purchases, and recommending the product to friends and family. Also, will customers stop calling customer care and use self-help tools instead? This reduces the workload for employees. Customer retention should also be a business metric for measuring ROI.

2. Customer Experience Metrics

Here, you must measure the attitudes, behavior, and perceptions of customers. Survey tools like the Customer Effort Score (CES), Customer Satisfaction Score (CSAT), Net Promoter Score (NPS) and Quality of Customer Interaction (QCI) can be used for this purpose.

3. Correlating Business and Customer Experience Metrics

Here is where you will begin to relate how customer satisfaction will affect revenue. You can use the business metrics you outlined (e.g. purchase amount and frequency, loyalty, products returned). These should be merged with CX metrics such as the NPS, CSAT, CES, QCI scores.

For effective correlation, regardless of the chosen metrics, customers should be grouped into groups — three to five groups are probably sufficient. The grouping depends on the responses to the survey tools. For instance, the NPS score can have you group customers into Promoters, Passives, and Detractors.

Each group should be monitored against business metrics. The advantage of this is you can track improvements on a more granular scale — for example, monitoring these groups can help you measure the ROI of customers moved from the Passive group to the Promoters group.

Implementing a customer experience improvement program is not an undertaking to be started and stopped simply. Investment of time and resources, as well as potentially budget dollars, is something that should be expected — but the upsides usually far outweigh this investment.

Higher customer satisfaction and experience often translate into longer term customer loyalty and an improvement of strategic business objectives. Customer expectations are constantly on the rise, but by spending the time caring and nurturing their needs, you'll be in a great place to deliver an exceptional customer experience, both now and in the future.

Customer Experience Map Template

This template is designed to tie in with the chapter “Customer Experience Mapping: How to Create Smoother, More Effortless Journeys”.

It follows the customer experience mapping steps laid out in this chapter (Connection > Exposure > Experience > Mastery & Activation.)

For each touchpoint, map it and be sure to include the channel. For example, “Customer receives a leaflet in the post advertising a special offer.”

Then map your customer’s actions. For example, “Customer decides to call to inquire about the offer and ask if they can access it. They’re not totally sure whether they are entitled and feel they need to double-check before taking the offer up.”

Needs and expectations should cover, in detail, what your customer expects or needs at each touchpoint. For example, “Customer expects they should be able to access this offer, as they received it in the post addressed to them. They need to know what they’re entitled to as a customer.”

Thoughts and feelings covers the emotional state of your customer. Think about whether the effect of all of the above leads to a positive, neutral or negative experience across the touchpoint. For example, “Customer feels excited they can access a special offer and save some money. They feel positive after having received this communication.”

Opportunities for improvement covers the actions you can take from reviewing the above, especially in the case where an experience has been perceived neutrally or negatively. For example, “Make wording in postal communications clearer regarding eligibility of the offer.”

Metrics to track helps you gauge what you can do to track this proposed improvement. For example, “Track customer complaints relating to eligibility using wrap statistics compiled from live agents.”

We hope this template helps you map and create an even better customer experience for your business!

Customer Experience Mapping Template



Stage	Connection	Exposure	Experience	Mastery & Activation
Customer Touchpoints & Channels				
Customer Actions				
Customer Needs & Expectations				
Customer Thoughts & Feelings				
Opportunities for Improvement				
Metrics to Track				

About Comm100

Comm100 Network Corporation is an award-winning global provider of enterprise live chat solution. Comm100 Live Chat is used by thousands of businesses worldwide to support their website visitors in real time so as to increase conversions, boost customer satisfaction and lower operating costs. With "100% communication, 100% success" as the company motto, Comm100 is committed to ensuring that transitioning human-to-human interactions to real-life success stories is always possible in a digital world.

Customers



Accreditations



Contact Us

TEL | (778) 785-0464

E-Mail | sales@comm100.com

Fax | (888) 837-2011

Web | www.comm100.com

Follow us on |    

Suite 238 – 1027 David Street Vancouver, British Columbia V6E 4L2 Canada

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