



# Customer Experience Maturity Assessment

Taking your Customer Experience to the next level

# Do these look familiar?

“We have been doing a lot of work in the past years, including a complete reset of our CX approach – but now we are not sure **how to take things to the next level**. We are great at running a 10 Miles, but we need to get ready for the Marathon”

*CMO, mobile operator group*

“We have gone through a rebranding and launched a new value proposition. Now every team has a different view on how to bring that value proposition to life. **Where to focus, how to work together?**”

*CX Manager, mobile operator*

“Every department has **its own interpretation of customer experience**. Most also seem to think we are doing really well in CX – while I doubt that we do. Help me analyse the situation”

*CMO, Top 5 Country of German Car Brand*

**“We are on our way, but have lost momentum.** There are too many options out there, we don’t know **where to prioritise**”.

*Head of Strategy, Major Global B2B producer for the logistics industry*

# How good is your business at...



...realising the **value** of Customer Experience?



...empowering and **motivating employees** to be customer centric?



...listening to the **Voice of the Customer** and act on it?



...running the **information systems** that support your CX?



...**managing** Customer Experience across all touchpoints and channels?



...**yielding profits** by being customer centric?

In just a few days, our **Customer Experience Maturity Assessment** measures the performance of CX in your company and lays out the way for immediate improvement.

# Focus your actions. Align your people.

In two weeks, our **Customer Experience Maturity Assessment** (CXMA) enables you to measure and benchmark the performance of CX in your company, align all departments around a common ambition, and define your prioritised CX roadmap.

You will find out which activities are bringing you closer to customers and which barriers you are still facing. Our experts will compare you with the best in the industry, identify gaps in your capability and show you how to **take your CX to the next level... fast.**

The result is an **aligned roadmap** to take the organisation to its **next level** of customer centricity.



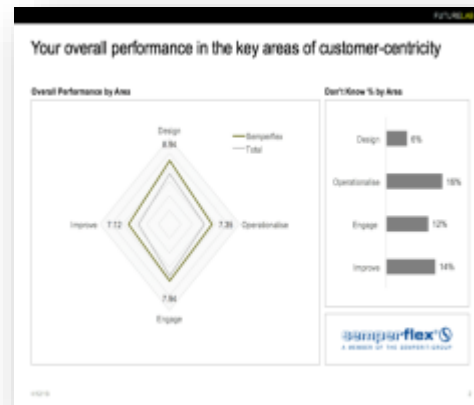
# The Commercial Intro



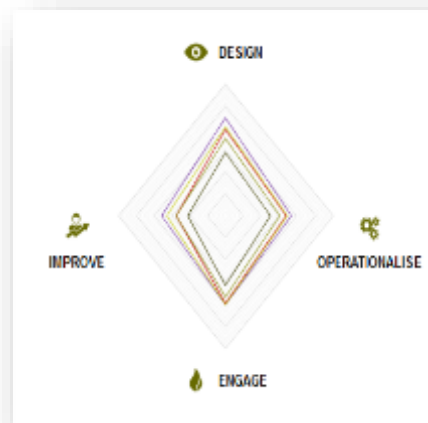
Across the 4 key domains



'What's the next level'



Clear visual output



Differentials by department/Level

- Gain customer insights
- Develop a customer strategy
- Define the desired CX

- Customer Driven Processes
- Align IT & Data Management
- International vs. local vision

- Sr. Leadership Focus
- Employee Encouragement
- Customer skills & mind-set

- Listen to VoCustomer
- Follow up on VoCustomer
- Translate CX into money

Managing the Customer Experience

## The CXMA assessment: a quick overview

Key Questions

# Overview of Questions

Design		Operationalise		Engage		Improve	
Question	Your feedback (1-5)	Question	Your feedback (1-5)	Question	Your feedback (1-5)	Question	Your feedback (1-5)
1 To which degree does your business look at customer feedback and market research to uncover rational and emotional insights about its customers?		Do you create actionable insights based on your Voice of the Customer (VoC)-programme and operational data?		How much does your senior leadership team focus on customer topics?		To which degree does your business follow up on customer feedback, both individual and collective?	
2 Has your company defined it's customer strategy, and is it integrated in your overall business strategy and planning?		Do you ensure all stakeholders in the company get these actionable insights?		To which degree are your employees encouraged and willing to get involved in or take customer initiatives?		Does your organisation act upon the insights derived from your VoC and operational data?	
3 Has your company defined the customer experience it wants to offer its customers at every step of their journey?		Which KPI's and targets does your business use to evaluate its customer performance, and do you regularly evaluate these KPIs?		How deeply are your customer goals embedded in your people & culture strategy? Do you develop CX & EX capabilities?		Do you have a programme to understand, capture and stimulate customer advocacy?	
4 Has your company defined the value to be gained from its CX efforts, as well as defined how it will be tracked and forecast the impact?		How good is your company at adapting operational processes (including IT & Data Management) to your customer strategy?		How much initiative does your business allow employees to display when it comes to customer experience?		Do you innovate based on customer insights and customer trends?	
5 Does your company have a governance model to develop and support the organisational mechanisms needed for a customer centric operation?		Does your company have the right CX tools in place? Is your digital transformation progressing effectively and efficiently?		Do you actively communicate the goals, benefits and achievements of your CX efforts to everyone in the company?		How rigorously do you challenge your existing views on the customer (experience) goals you pursue through market foresight?	
<b>Total / 25</b>		<b>/ 25</b>		<b>/ 25</b>		<b>/ 25</b>	





# Customer Service

1. Customer service vision
2. The right tools
3. Contact center as a profit center
4. Futureproofing the contact center
5. Willing, skilled and able staff

<i>Does your organisation have a customer service vision?</i>	We do not have any vision on how our customer service should develop.	We execute on the operational targets set for us on a yearly basis but do not have a common understanding on a joint strategy.	We identify areas of improvement to identify business cases and acquire project-based budget.	We are analyzing our current customer service organization to identify areas of possible improvement and identify our internal service vision without aligning it with other departments.	We have a clear vision of where we want our customer service to stand in 5 years, and have a back-planning to achieve it.
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## 1. Aspiring



*I should start ...*

## 2. Active



*Weekend jogger*

## 3. Performing



*New York marathon*

## 4. Elite



*Iron man*

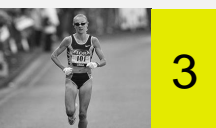
CXMA Introduction

# 4 different levels of performance





4



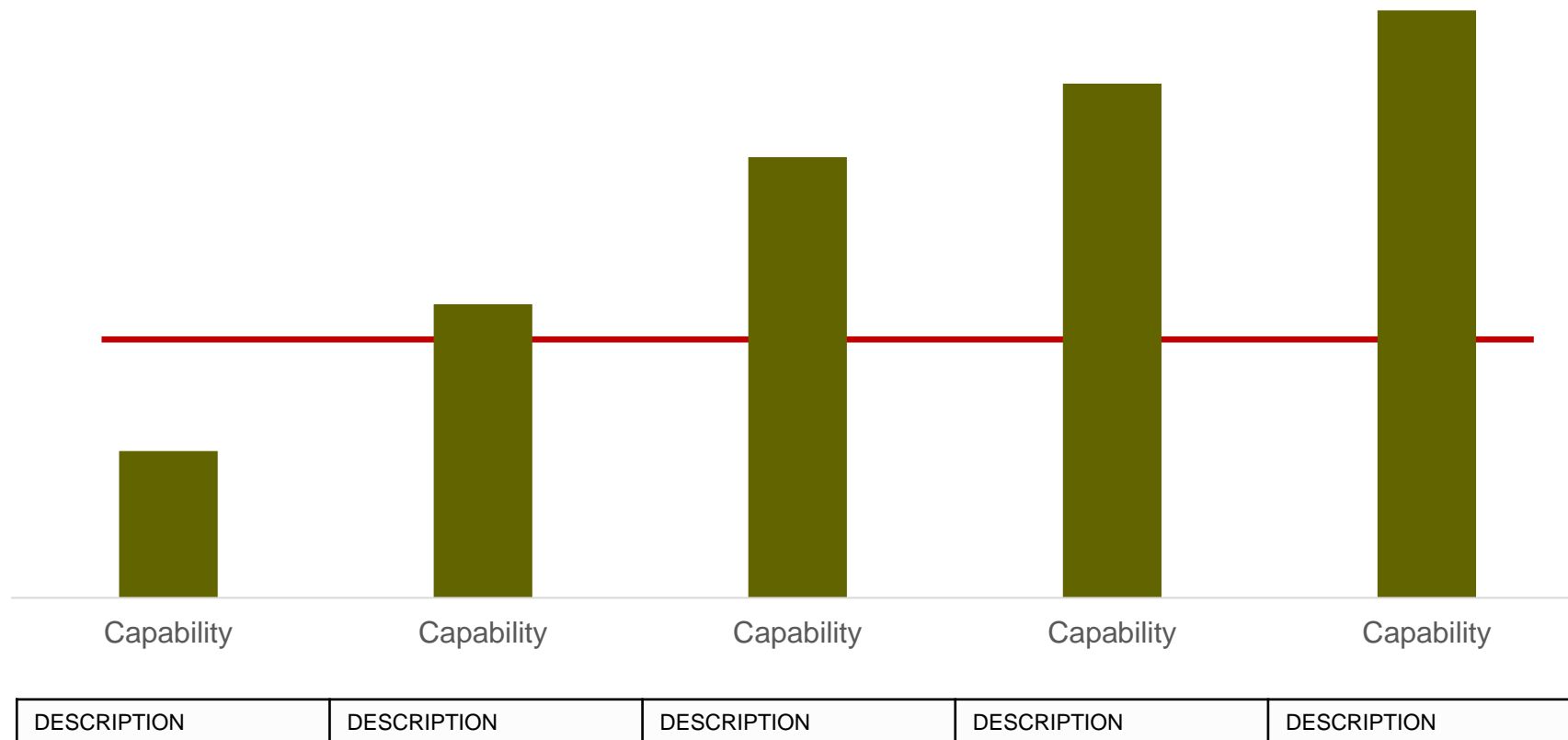
3



2



1



How to read the CXMA

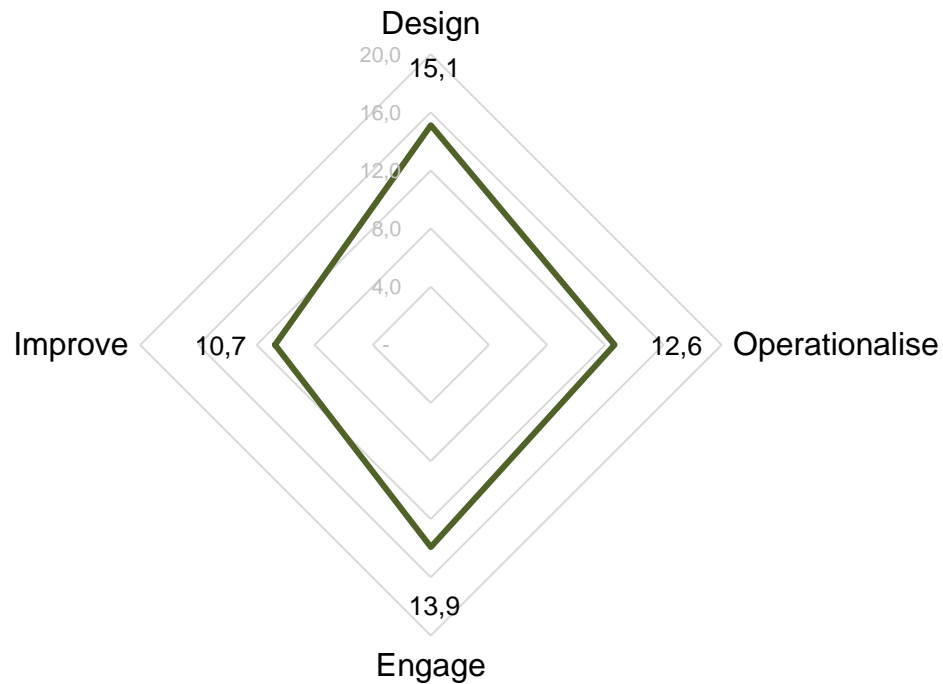
# 4 performance levels for each capability



What we found out

## Findings: CXMA online questionnaire results

# Overall performance in the key areas of Customer Experience



Your Overall  
CXMA Score  
**52.4/80**

Overall performance

**XXX is a *middling* performer**

LOGO



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*New York marathon*

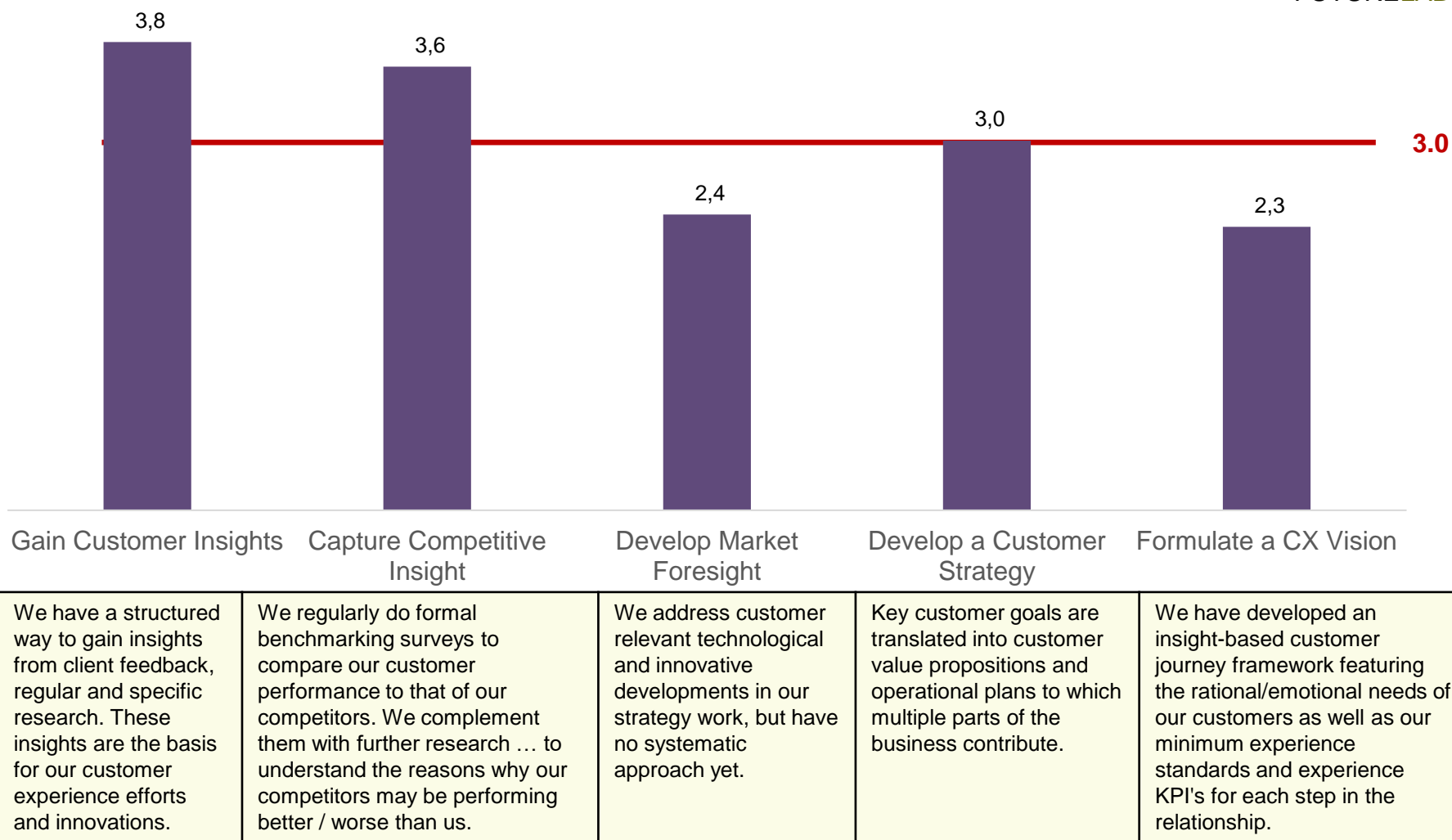
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*Iron man*

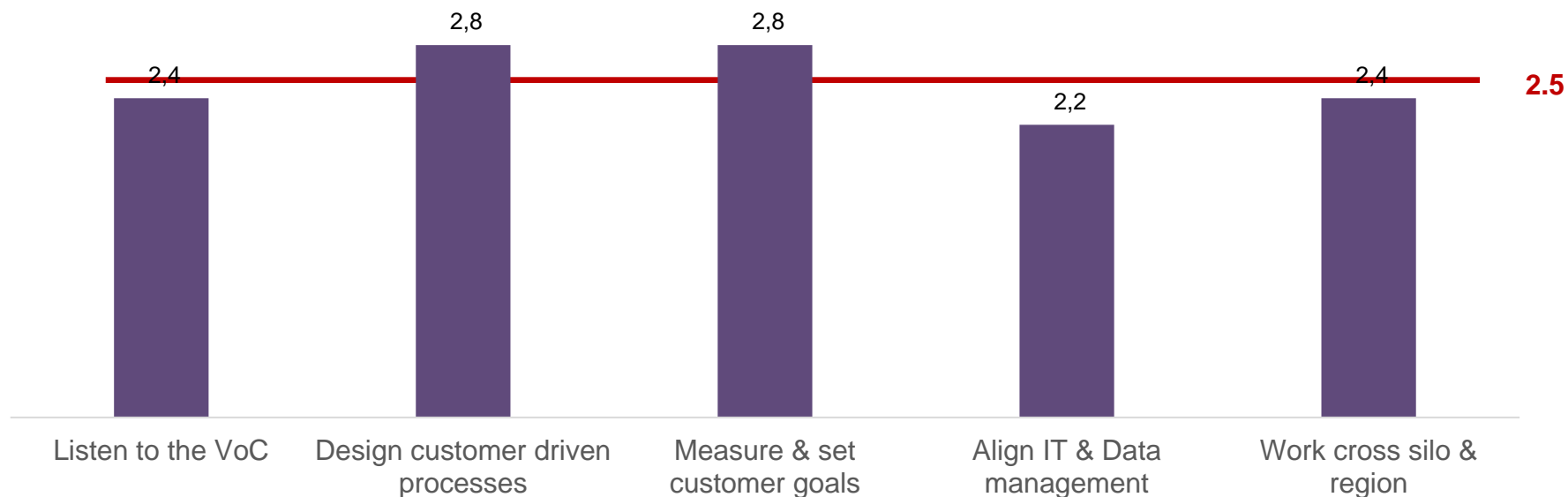
CXMA at XXX

You are here



Capabilities: DESIGN

# Not a clear picture on the CX to deliver (and why)



We have a Voice of the Customer (VoC) programme and have deployed this for our most important customers and touchpoints / journeys.

We make sure that our organisational processes are aligned to the most important aspects of our Customer Experience Vision.

We actively apply a few high-level / all company customer performance KPI's and targets and have translated those into operational/departmental KPI's and targets.

There is a process to directionally align our IT / data priorities to our customer strategy and customer experience vision, but both operate quite independently.

We have a customer champion (responsible) who facilitates cross-departmental/regional customer initiatives on an ad hoc/as time allows basis.

Capabilities: **OPERATIONALISE**

# Processes and KPI's aren't yet driven by customer



Our Sr. Leadership team cares for and regularly discusses customer topics and drives/encourages customer driven action by the business.

Our customer champion encourages our people to get involved in or take customer initiatives through their own personal efforts and ad hoc communications.

Customer goals, considerations & behaviours are embedded in all recruitment, learning, communication and performance management aspects of our people & culture strategy.

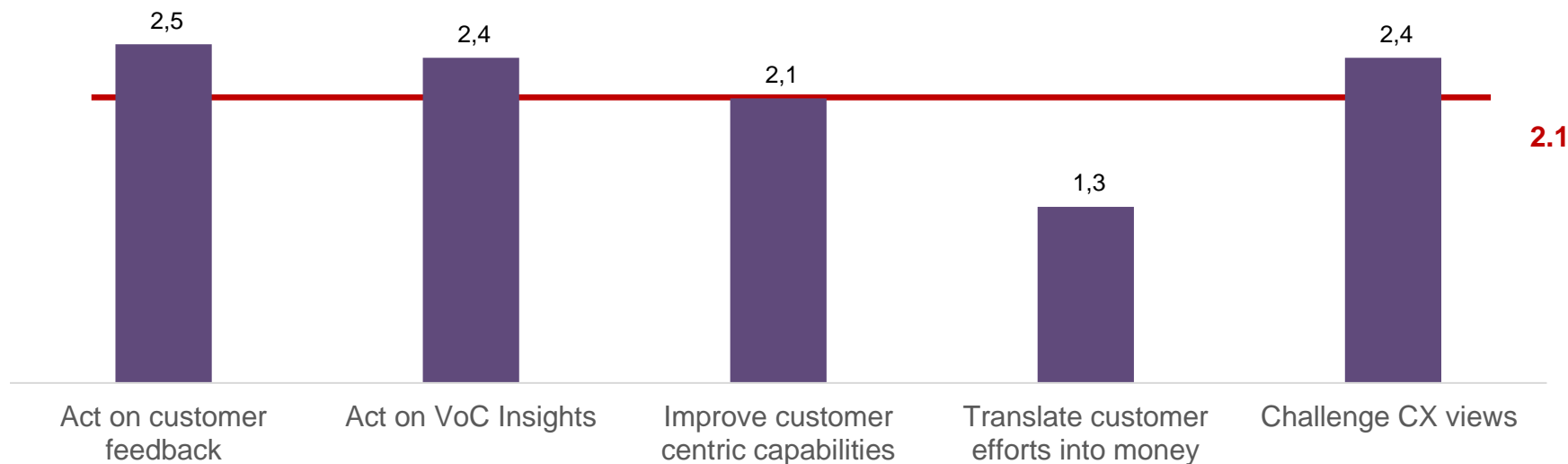
Employees understand what the Customer Strategy and Customer Experience Vision means to their job/department and they are encouraged to actively propose changes where the two are disconnected or where improvements can be made.

A few times a year we take company wide initiatives to let employees engage with customers or review customer insight / voice of the customer data. We also explain the customer strategy and customer experience vision to all employees.

Capabilities: ENGAGE

# High willingness but limited (inter)action & initiative





We've developed and trained relevant employees on a tactical closed loop process for client feedback and achieve quantitative and qualitative targets. Customers are systematically informed of changes that have been made based on their feedback.

We occasionally close the loop on VoC insights, usually triggered by a major issue or opportunity.

We have an understanding of the capabilities our business requires to be customer-centric and the degree in which these capabilities are available in our business.

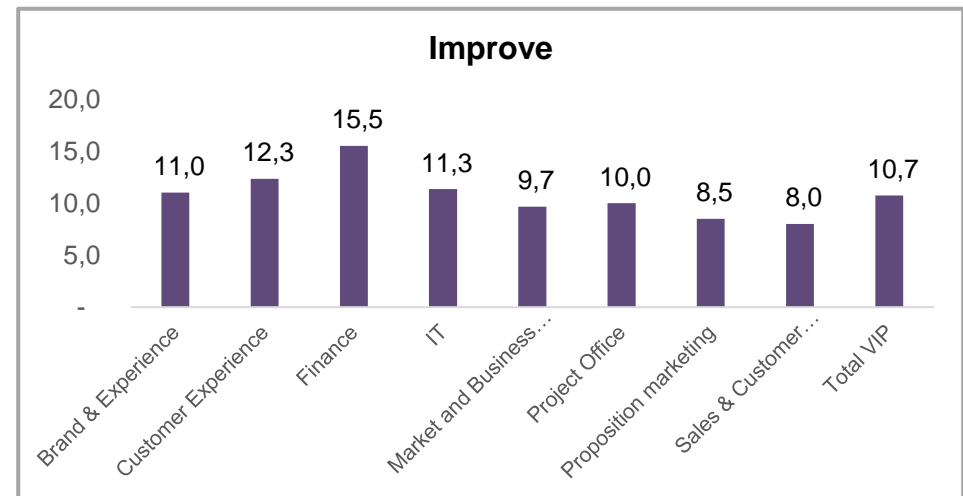
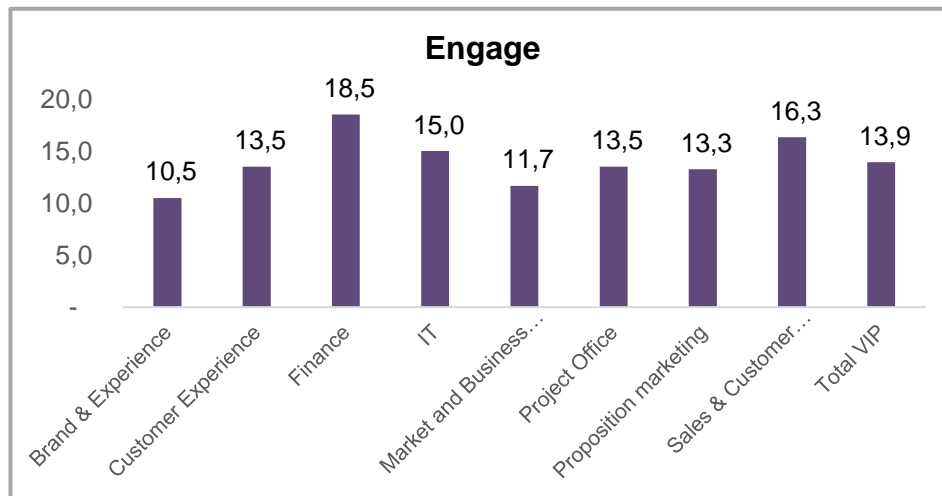
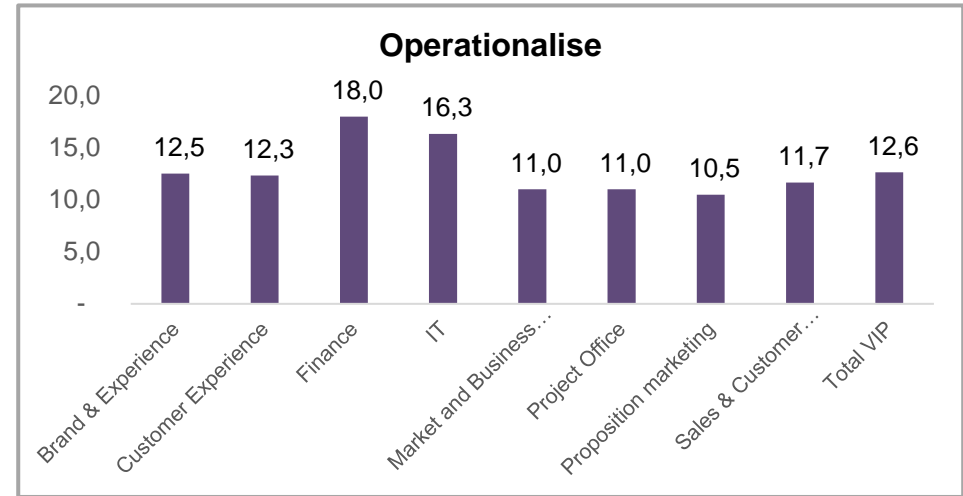
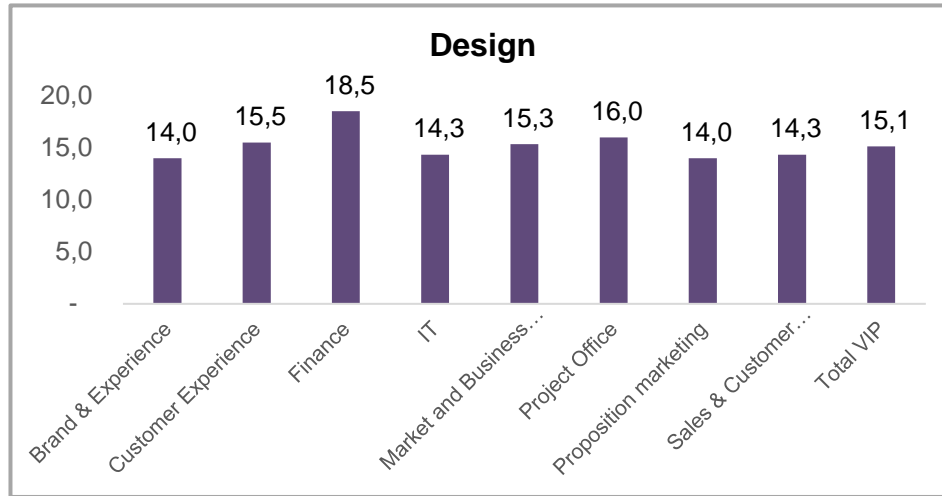
We haven't yet developed a formal business case for customer-centricity

We occasionally challenge our customer strategy and customer experience vision by looking at the trends and remarkable practices in our industry and feedback from our customers.

Capabilities: IMPROVE

# Weak continuous improvement infrastructure

# CXMA: Scores by department – a highly impactful analysis!





General findings

## Findings: Stakeholder interviews

# Stakeholder Interviews:

## 1. Low feedback amount damages Tell BigCo's credibility

- Survey basics not established correctly. No clarity on:
  - **Who** exactly is being surveyed (position, influence...)
  - When is **the right moment** for a survey for them
  - What are their **preferred channels**
  - **What topics** actually matter

*"We don't know who answers. It can be a part-time clerk who has begun last week and just happens to be the one opening the mail or paying the bill."*

*"How can that gas station manager operating 5 stations recall his order for one station a week ago?"*

*"700 Customers and only 2 responses: I can't act on this, it's not representative"*

## 3. Low actionability disengages users and leads to system gaming

- Tactical loops work but **findings don't reach outside the department**, negative and positive alike
- No strategic closed loop leads to feeling that **important issues are never addressed**; deeming feedback is essentially useless
- Current **KPIs are not driving action** or driving the wrong ones

*"That low score cannot be correct. We should indicate how [the customers] should be really answering"*

*"Not even looking beyond the 8.5 – we don't even read the verbatims of the 9's"*

## 2. Disconnect from Customer reality => multiple issues

- Touchpoint-only does not allow for improvement of key issues (**problems at journey step 3 are created in steps 1 and 2**).
- Asking the **same things from the same people** without showing improvements creates survey fatigue and lowers response rate
- **Siloed, one-angle KPI** instead of holistic view of the customer makes proactivity on crucial issues difficult

*"80% of our interactions are on recovery, not adding value. Lets solve that first"*

*"I want to know what is going on BEFORE it happens – like in a relationship, not just when the other person walks out the door."*

## 4. Limited accessibility to insights discourages users

- **Usable insights are hardly available**; existing ones are **not** helpful to drive action.
- Insight **hard to access**, and even skilled people need several steps to get from output to an action; if at all
- Many **don't know if / that they have access** to certain data

*"too much digging for root cause, no clear next best action available"*

*"Red alerts do get acted upon, no issues. But too many topics are outside control of those getting the feedback, so they are ignored"*

*"We should ask the agent how easy it was to solve a customers problem – now THAT would give us some insights!"*

# VoC Assessment | Dimensions



## STRATEGY

## VALUE

## DESIGN

## ACTIONABILITY

## TECHNOLOGY

## PEOPLE

## CULTURE

What do we really want to achieve?

How we will achieve it?

What is the expected ROI?

Do we have the right KPI's? Roadmap?

What does success look like?

Have we created value?

How do we demonstrate that value to everyone?

How do we improve value for the next step?

How is the whole machine designed?

Are we talking to the right people in the right channels?

Are we sticking to the methodology to ensure comparability or results?

Do the results inspire action?

Are the actions enabled?

Do we have priorities? Plans? Responsibilities?

Does the system let us do what needs doing?

Is it connected to other existing systems?

Is the usability good? What can be improved?

Are our people willing, skilled and able?

Do they understand what we are aiming at?

Are the people inspired?

Do we use the right KPI's?

Do we have customer-led values and behaviors?

Is the right behavior supported by leadership?

Is the system driving change?





2020 ambition level

# Acceleration Workshop results

## 1. Aspiring



*I should start again ...*

## 2. Active



*Weekend jogger*

## 3. Performing

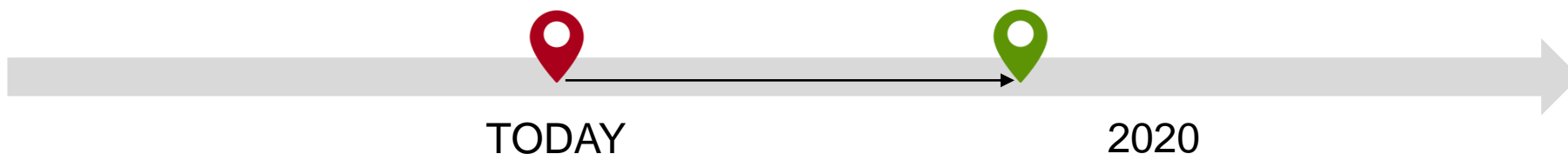


*New York marathon*

## 4. Elite



*Iron man*



***The questions were asked:***

***Do you agree with this ambition level ? If yes, from now on everything else is “consequences”***

The workshop set the 2020 ambition level:

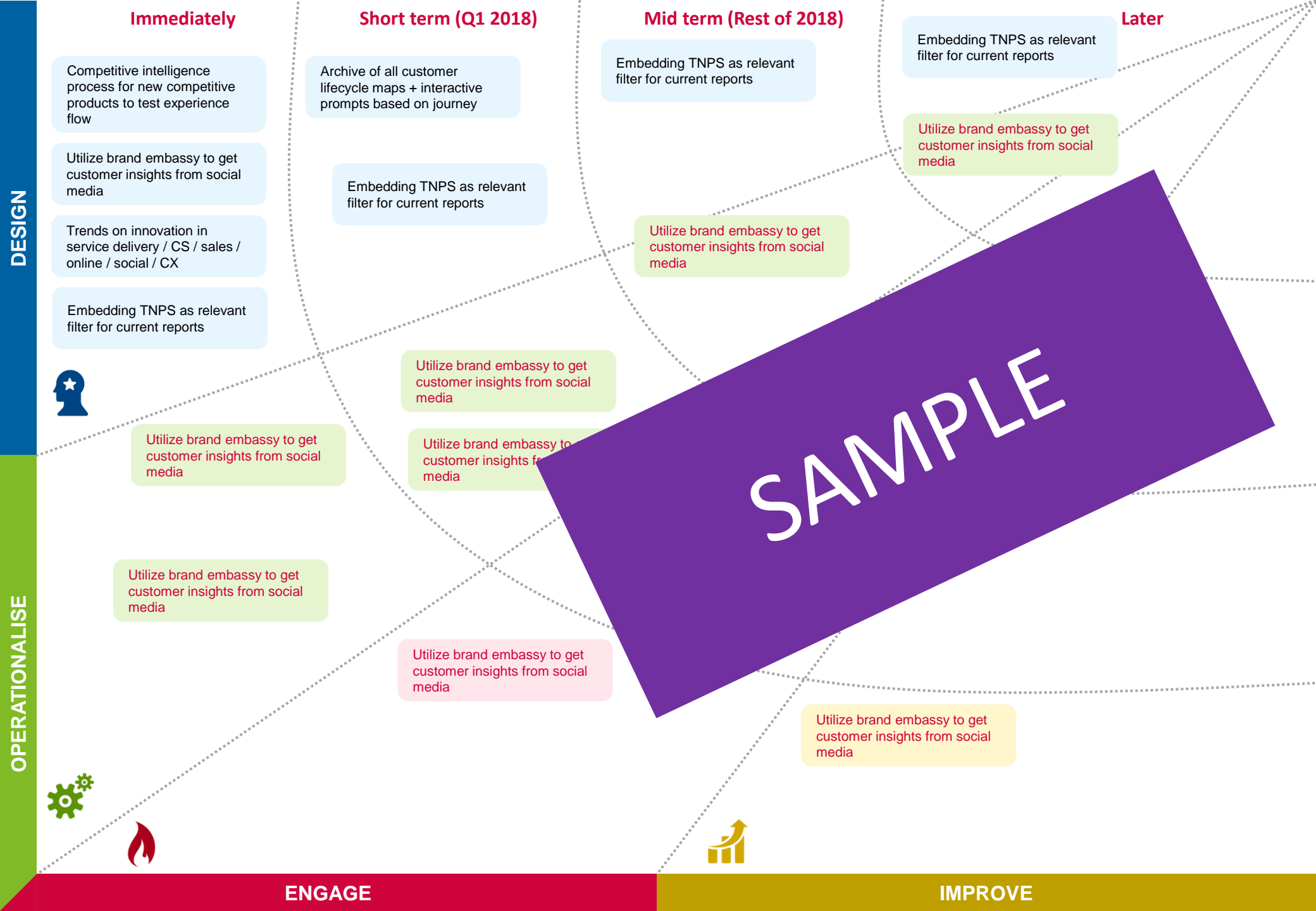
**Turn XXX into a *performing* customer organisation**



# Aligning on the future state

○ = Desired future state

DESIGN	Gain Customer Insights		Capture Competitive Insights		Develop Market Foresight		Develop a Customer Strategy		Formulate a Customer Experience Vision	
	Current State = 3		Current State = 4		Current State = 2		Current State = 3		Current State = 2	
	Not using big data, but otherwise pretty much at top level	4	Competition Experience Insights	4	Really need to get going on this, as it's essential to keep a differentiated market position	4	Going to level 4 just not realistic	3	Stuck at level 2 for at least 2.5 years now, need to get moving again	3
OPERATIONALISE	Listen to Customer Feedback (Voice of the Customer)		Internal Customer Processes		Measure and Set Goals for Customer Performance		Align IT & Data Management to Customer Goals		Work on Customer Priorities across Departments & Regions	
	Current State = 2		Current State = 3		Current State = 2.5		Current State = 2		Current State = 2.5/3	
	But closing in on 3	4	<ul style="list-style-type: none"><li>Service design</li><li>Need full view</li><li>CJ Blueprint &amp; verify</li><li>Push to 3.5, more not realistic</li></ul>	3	Not just KPI's, also experience goals (touch too flex, can avoid)?	3	Difficult but not impossible. IT team willing to commit.	3.5, 4	<ul style="list-style-type: none"><li>Silos are real, but not actually that bad in CX</li><li>We deal well with problems once they happen, but not preventing them</li><li>Need structure</li></ul>	4
ENGAGE	Behave as Customer-Centric Leaders		Encourage Employees to Engage with Customer Topics		Develop a Customer Driven People Strategy		Encourage Employee Initiative		Build Customer Appreciation	
	Current State = 3.5		Current State = 2.5/3		Current State = 2		Current State = 2		Current State = 2.5	
	Doing good, only small improvements needed	3.5	<ul style="list-style-type: none"><li>Frontline is doing ok, rest not so</li><li>Factory initiative</li></ul>	3.5	<ul style="list-style-type: none"><li>Only good in CS and sales</li><li>Limited potential for improvement</li><li>Nothing in current recruitment</li><li>People longer in company do not have good view on what CX is</li></ul>	2	<ul style="list-style-type: none"><li>CS is good, rest not</li><li>Show great examples of breaking the rules</li><li>Show examples of how mistakes can be learned from</li></ul>	3.5	Consistently preach 'customer' Expose individuals to data and customers	4
IMPROVE	Follow-up on Customer Feedback		Act on VoC Insights		Translate Customer Efforts into Money		Customer Experience Management Capabilities		Challenge Your Own CX Views	
	Current State = 2.5		Current State = 2		Current State = 2		Current State = 2		Current State = 2.5	
	Good closed loop, but no feedback to customer Need a communications plan	3.5	Need prioritisation	3	Intense discussions about which approach to take	3		3		4



# Roadmap Workshop



# Legend

Recap of the question and details of this particular step

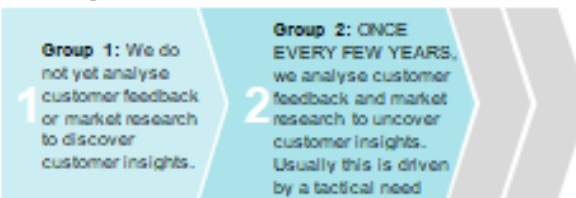
The official next steps according to the CustomerFit method to reach the desired end state

## DESIGN. Gain Customer Insight.

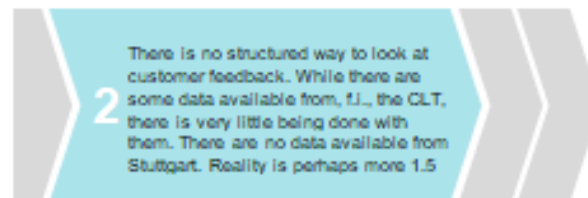


To which degree does your business look at customer feedback and market research to uncover rational and emotional insights about its customers?

### Your analysis:



### Our observation:



### Where you should be:



### Recommendations / Next Steps



#### Customerfit

- 1-2 First customer insights research
- 2-3 Annual customer insights, insight based strategy
- 3-4 Continuous customer insights, insights based CX, insights based innovation



#### Tactical

- Review existing data from Customer Loyalty Team (CLT).
- Review data from NPS pilot



#### First steps towards strategic goal

- NPS pilots other segments
- NPS rollout plan development & first stages of rollout
- Develop initial segmentation/personas



#### Strategic

- Conduct a full NPS rollout (including robust platform setup, structured communication plan, Closed Loop process setup, including guidelines and workshops).
- Consider full insights customer panel study

Initiatives not specifically linked to ambition levels, 'quick wins'

Initiatives specifically linked to ambition levels

Topline initiatives that will help to achieve the ambition level. Not worked out in detail at this stage.

The agreed ambition level from the workshop

How you judged yourself – Group 1 are E3 and E4 answers, Group 2 are promoters who have answered the questionnaire

How we see the reality, adapted based on the feedback gathered during the workshop.



To which degree does your business look at customer feedback and market research to uncover rational and emotional insights about its customers?

### Your analysis:

- 1** **Group 1:** We do not yet analyse customer feedback or market research to discover customer insights.
- 2** **Group 2:** ONCE EVERY FEW YEARS, we analyse customer feedback and market research to uncover customer insights. Usually this is driven by a tactical need

### Our observation:

- 2** There is no structured way to look at customer feedback. While there are some data available from, f.i., the CLT, there is very little being done with them. There are no data available from Stuttgart. Reality is perhaps more 1.5

### Where you should be:

- 4** We CONTINUOUSLY improve our customer insight through client feedback, general and specific research. These insights are the basis for our customer experience efforts and innovations.

### Recommendations / Next Steps



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A short summary of what the project is about

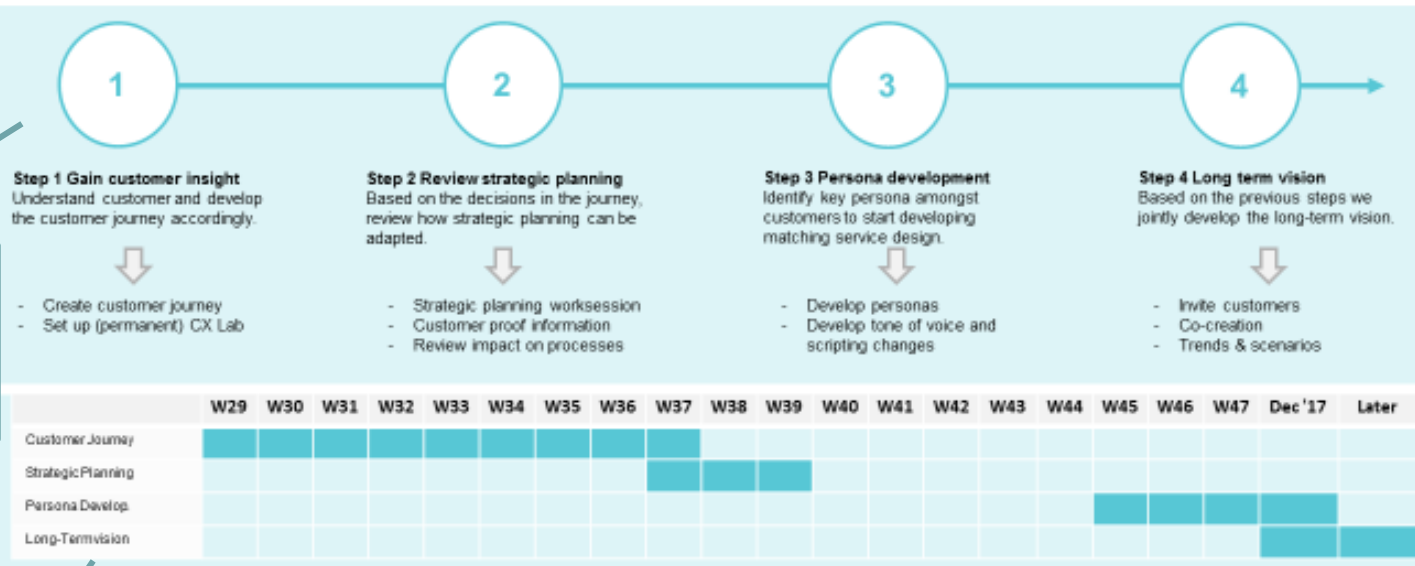
The total estimated effort, based on the average of various elements identified in the separate spreadsheet. This includes out-of-pocket for f.i. Futurelab

Only planning and preparation costs are included, not ongoing running costs.

## SERVICE DESIGN

To be able to develop a vision, we need to start thinking from a service design POV – "what is the experience we want our customers to have and how do we deliver it?". The starting point for this is developing the customer journey framework. Understanding the steps in the journey and what the emotional and rational needs of the customer are at each step helps us define what experience our customers need, and what we want to deliver. Based on this we can then identify the value generated for all stakeholder. Building on that we can develop personas and more detailed approaches to create customer happiness, including customer persona driven service design and a long term vision. Underpinning this all a permanent CX lab to test concepts.

Total estimated Effort: Medium



The major steps of the project. These steps roughly overlap with the immediate/short-term/mid-term/long-term timings.

	Project	Timing
Must have	Customer Journey Review strategic planning	Immediate Short-Term
Should have	Customer proof information/process simplification Trend analysis Customer Personas	Short Term Later Mid-term
Could have	Invite customers into the CAC Customer Co-creation	Later Later

### How Futurelab can support

- Developing Customer Journey Framework
- Sounding Board strategic planning
- Develop customer segmentation
- Support development of tone of voice initiatives
- Trend identification and scenario development

An overview of how we see the timelines fit together.

An overview of what is essential to the success of the overall project and what components are useful in the progress.

A summary of where Futurelab has the most added value for this project.

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**Step 1 Gain customer insight**  
Understand customer and develop the customer journey accordingly.



- Create customer journey
- Set up (permanent) CX Lab

**Step 2 Review strategic planning**  
Based on the decisions in the journey, review how strategic planning can be adapted.



- Strategic planning worksession
- Customer proof information
- Review impact on processes

**Step 3 Persona development**  
Identify key persona amongst customers to start developing matching service design.



- Develop personas
- Develop tone of voice and scripting changes

**Step 4 Long term vision**  
Based on the previous steps we jointly develop the long-term vision.



- Invite customers
- Co-creation
- Trend analysis & scenarios (link with IT/Data)

	W29	W30	W31	W32	W33	W34	W35	W36	W37	W38	W39	W40	W41	W42	W43	W44	W45	W46	W47	Dec '17	Later
Customer Journey																					
Strategic Planning																					
Persona Develop.																					
Long-Term vision																					

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