

Coaching for customer experience professionals

Notes & guidance



Overview



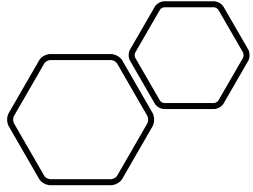
- Most customer experience professionals work in small teams or solo
- This coaching is designed to provide senior level advice, support and education in their roles

- 1-2-1 weekly calls, approximately 1 hours long
- Aligned to clients' current needs and challenges
- Follow up with summary notes



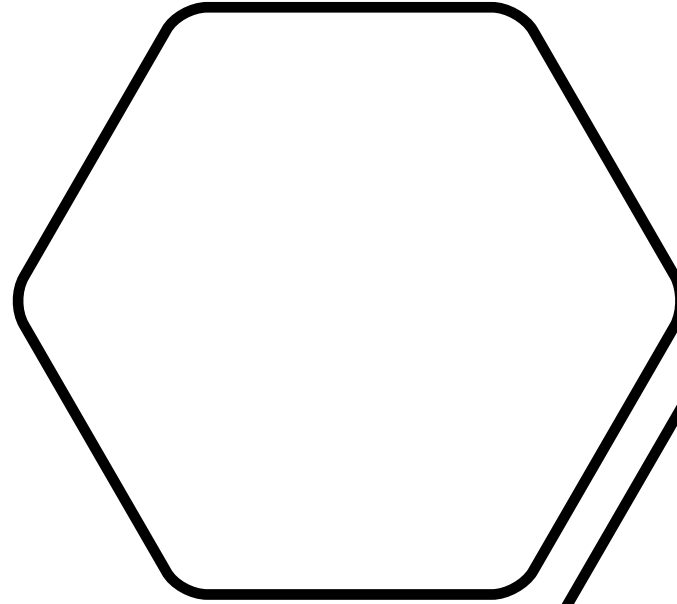
- Based on documented structured knowledge
- Is flexible and can be easily tailored
- Includes consulting elements





A client story

- Holly leads a Customer Experience function (of 1) at a global company
- She has not got a budget yet for extensive consulting support
- She is relatively new to the role though and needs support



The structure

Based on the CXPA Competency Framework



Innovative application: modular and flexible to address what is most critical for the client

Supplements it with elements of CX history and CX transformation concepts

Conscious business discipline

Customer Experience is still not a universally recognized, embedded and conscious business discipline.

The ideal state of CX maturity in a country is that all companies, governments and organizations understand customer needs, continually respond to them, and continually adapt to stay relevant to customers.

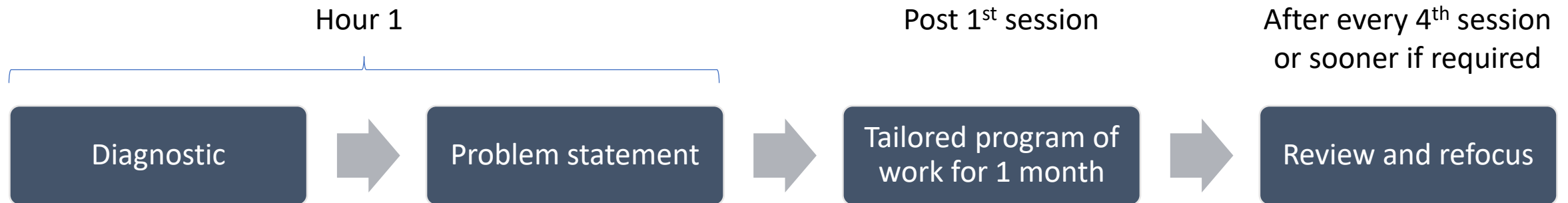
The maturity level of CX in the world according to experts in that field



Source: survey of 70 customer experience professionals, May 2020, European Customer Consultancy



Effectiveness and efficiency



- Using a structured discussion guide

- Playing back to the client what their top 3 development priorities are at the moment

- A high-level plan for the next 3 sessions
- Easy to adapt should the priorities evolve

- Client feedback
- Confirm progress and next steps
- High-level plan for the next 3 sessions



Diagnostic

1-hour discussion guide:

- A semi-structured questionnaire pertinent to client's challenges, level of organisational buy-in, CX competencies, and professional objectives

The diagnostic conversation flow would vary to ensure the development objectives are crystallised and confirmed as fully and quickly as possible



Predictable and accurate results



Preparation

Using documented materials, prepare to the next session



Conversation

In the session, use the materials if necessary but keep it conversational, practical and above all relevant to the client's needs



Review

At the end of each session confirm usefulness, understanding and objectives for the next session





Outcomes

- Increased confidence due to regular professional support
- Ease of taking decisions as have a qualified sounding board
- Better career prospects
- Improved buy-in from stakeholders
- Quicker progress for customer centricity
- Enhanced CX knowledge



Reference slides & structure



Course structure: CX Competence

Customer experience (CX) - definition, myths and reality	<ul style="list-style-type: none">• Definition of CX• Key differences from customer service, user experience, marketing• CX place in the organization• The Role of the CX Professional
CX history and modern application	<ul style="list-style-type: none">• When did the CX begin and when did it become a conscious business discipline• Developing customer-centricity - origins, cultural context and benefits
CX transformation	<ul style="list-style-type: none">• From competition on price and product to an economy of experience• The main characteristics of a client-oriented organization, types of CX frameworks



Course structure: CX Competence

1	Strategy	<ul style="list-style-type: none">• CX strategy• How it fits into the business strategy• Why a CX strategy is needed• Examples and cases
2	Organization Acceptance, Responsibility and CX Management	<ul style="list-style-type: none">• Who is responsible for implementing CX• How to succeed• Examples and cases
3	Customer insight	<ul style="list-style-type: none">• A source of CX and customer information• The role of employees in providing insights• Openness of insights and ways of sharing• Examples and cases



Course structure: CX Competence

4	Measurements	<ul style="list-style-type: none">• The connection between the voice of the customer, the process and the employee• Examples and cases
5	Customer journey management	<ul style="list-style-type: none">• What is the customer journey• Customer journey map• customer journey Management• Examples and cases
6	Customer-centric culture	<ul style="list-style-type: none">• Assessment of the degree of CX in organizational culture• Culture change• Heroes among employees• Examples and cases
	CX tools	<ul style="list-style-type: none">• Customer journey map (repeat and deepen)• Design thinking• Change management• Process improvement• Practical exercises in the classroom and for independent work

