

# CUSTOMER EXPERIENCE SERVICES

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Tips, Tools, & Techniques  
for CX Success

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CUSTOMERSFIRSTNOW

# Introduction

This document was written for anyone who is in, or wants to be in, the Customer Experience field and wants to get a good introduction to CX principles, insights, tools, and resources.

CustomersFirst Now has been a leading CX company for the last 15 years by providing CX solutions for companies all over the world. We've helped implement hundreds of enterprise CX programs, and we developed a Journey Mapping software platform to help companies better understand and improve their customers' journeys.

Based on this experience, we believe we have some insight when it comes to what Customer Experience is, how Customer Experience Services are delivered, and how a solid Customer Experience Services strategy and roadmap can make a world of difference in the overall long-term success of your company's CX program, brand, and financial outcomes.

To understand what Customer Experience Services are, first we need to explain what Customer Experience (CX) is, and what it is not.

## What Is Customer Experience?

Customer Experience (CX) describes the end-to-end interactions a person has with a brand over the lifetime of their relationship. The interactions begin at first encounter with the organization, their brand, their products, or their people and end when they leave the relationship.

This includes all formal and informal interactions such as walking into the new store at the mall, finding their product on a Google Search, or even meeting a new neighbor who works at the company. All of these will influence the potential customer's emotions, attitudes, and experience toward the brand.

Customer Experience programs are created to *manage the customer experience across the lifecycle of a customer* and involve all of the business functions of a company. Ideally, CX becomes a cultural shift to a more customer-centric, or customer-first, company.

## What Customer Experience is Not

CX has become very popular in the last few years, which means many companies in related fields with related products and services are starting to use the “customer experience” terminology as well, which has caused confusion.

- CRM/Sales
- Customer Service/Support
- Marketing Automation/Email
- Call Centers/Voice Technology
- Website/Web Analytics
- UX/Design

These are all important **aspects** of the customer experience; however, they all focus on specific portions of the customer experience. For example, CRM exclusively manages the sales process. Customer Service only addresses the customer experience post-sales. None of them comprehensively defines CX end-to-end.

## What Are Customer Experience Services?

Customer Experience Services encompass the tools, technologies, services, and products that directly contribute to a well thought out CX strategy and program implementation that makes a lasting and major improvement in the company. These are some of the major Customer Experience Services.

- [Customer Experience Consulting Services](#)
- [Customer Experience Training Services](#)
- [Customer Experience Best Practice Audits](#)
- [Customer Analytics Services](#)
- [Journey Mapping Services](#)
- [Survey Design and Analysis Services](#)

## What Are Customer Experience Technologies?

These are the main CX technologies used in the course of preparing, implementing, and sustaining a CX program within your company.

- [Journey Map Software](#)

- Journey Analytics Software
- Voice of the Customer (VOC) Platforms (Qualtrics, Medallia, InMoment)
- Survey Software (SurveyMonkey, SurveyGizmo)
- Analytics software
- Project Management software

## Why Are CX Services in High Demand?

Customer Experience services have become very popular in large part due to the rise of the internet and the increased **competitiveness** it requires to stand out and differentiate your business to be successful.

Successful brands used to have to invest millions of dollars developing a product, hiring employees to run the company, leasing or buying a store to sell the product, and buying advertisements on TV or the newspapers to promote the product. Few companies had the ability to invest that kind of money.

In the early days of the internet, some of these large expenses began to shrink as online ads began to take the place of expensive TV ads. Also, the internet enabled new digital software and SaaS products that were much less expensive to produce, promote, and sell using the internet. This enabled many new businesses with far less investment capital to compete with the large companies.

Now, unless you have a unique product that is highly differentiated, your company will need to try to stand out in other ways, like customer service, ease of use, and in general by having a strategy and program that optimizes the customer experience you deliver.

- In the last 15 years over half of the Fortune 500 companies have disappeared because they could not adjust themselves to the digitalization happening in the industry.
- By 2027, 75% percent of today's S&P 500 companies will be replaced by new companies which are providing the best customer experience to their customers.
- \$1.6 **Trillion** is the annual cost of customer churn due to poor experiences.
- \$55 Billion is the lost productivity for employees each year due to lack of engagement.
- 97% of executives believe that improving CX is very important to achieving or maintaining a competitive advantage.
- 80% of companies believe that they are providing a superior experience but only 8% of their customers agree.

- 91% of executives believe that improving CX is a top 3 priority for their company.
- In the next 5 years, customers' expectations will change as much they have changed in the last 50 years.

## Benefits of Customer Experience Services

There are many benefits to leveraging CX Services to help strengthen your focus on customers in order to improve all aspects of your business. Once your company is successful in implementing 'customers-first' culture, processes, and practices, then there are benefits such as **increased brand value, brand differentiation, improved product development, increased acquisition and conversion rates, reduced customer churn, improved employee experience, and improved financial metrics.**

Aberdeen Group's research revealed "the world's top performing businesses enjoy an average of **\$316 million in incremental annual revenue** as a result of their customer experience management initiatives, compared to their lower performing counterparts. The study was based on companies with an average annual revenue of \$1.08 billion, but across the board, organizations of all sizes can expect the business benefits of customer experience excellence to include increased customer loyalty and retention, reduced churn, higher lifetime customer value, greater brand equity and reduced costs of service."

## The Three R's of Customer Experience Services

### Revenue

- 56% of consumers say the overall enjoyment of the purchase experience is important in their decision to buy a product or service<sup>6</sup>
- 74% of consumers will likely switch brands if they find the purchasing process too difficult<sup>7</sup>
- 15% average annual revenue growth rate of 'Experience-Driven Businesses' vs other companies at 11%<sup>5</sup>
- 67% of customers say they will pay more for a great experience<sup>1</sup>
- 56% increase in cross-sell and up-sell revenue<sup>11</sup>
- 54% increase in Return on Marketing Investment<sup>11</sup>
- 67% of customers say good reviews from others influence the decision to do business with your company<sup>12</sup>
- 18x increase in average sales cycle time<sup>12</sup>

## Retention

- 90% of customers have stopped doing business with a company after experiencing poor service.<sup>12</sup>
- 32% of consumers stop doing business with a brand after only 1 bad experience<sup>9</sup>
- 89% of customers who feel valued will advocate for the company<sup>12</sup>
- 85% of customers who feel valued plan to spend more<sup>12</sup>
- 77% of customers who feel valued plan to remain a customer<sup>12</sup>
- 57% of consumers have stopped buying from a company because one of their competitors provided a better experience<sup>1</sup>

## Referrals

- 350% increase in customer referral value<sup>11</sup>
- 24% increase in positive social media mentions<sup>11</sup>
- 64% of consumers are more likely to recommend a brand to others if it offers a simpler experience and communications<sup>3</sup>
- 62% of consumers say they share bad experiences with other people<sup>1</sup>
- 71% of consumers recommend a product or service because they received a “great experience”<sup>10</sup>

If these specific benefits are not enough to convince you to leverage Customer Experience Services, there are many other benefits such as productivity, morale, and customer relationship improvements that are harder to quantify and measure yet could have a positive impact for your company.

# 12 Tips for Excellent Customer Experience

## 1. Assess Your Company's Customer Experience

Take this [CX Best Practice Assessment](#) which covers the 20 best practices of a CX program to use as a starting point to see how your company compares to similarly sized companies in your industry. This is a great way to evaluate where your company is, and to understand which areas need most attention.

## 2. Define Who Your Customers Are

If your company defines the customer as the external customer, that distances the vast majority of your colleagues who never interact with that customer.

However, if you define your customer as “anyone you serve” (both internally and externally) this opens the gateway for 100% of your colleagues to realize they do have customers – and on that idea you can build a successful customer-focused culture.

### 3. Model and Deliver Delightful Customer Experience

If you are in a CX role which is tasked with improving your customers’ experience, it is your responsibility to show others inside your company exactly what “delight-orientated” behavior and action looks like inside your company. For example, imagine what would happen if you responded to emails and phone calls the same day or sooner. You would surely stand out from others who wait days to respond. How you treat both employees and customers will go a long way in demonstrating what you expect from the rest of your company to their internal and external customers.

### 4. Map Your Customer Journey

Once you define who your customer is, you are ready to understand exactly what their experience is from their perspective by generating a customer journey map. A good customer journey map will define each stage of the customers’ interactions with your brand and detail distinct individual touchpoints. Through surveys, interactions, and data analytics, you can identify their pain points, moments of truth, and most importantly where those two overlap, so that you know where to take action to maximize your financial outcomes.



### 5. Engage Your Brand

Brands personify organizations and proper branding is how companies connect with customers. Knowing what a brand stands for helps customers choose between similar products and emotionally relate to a business’s message and values. What is clear is that there is a gap in creating customer measurements systems that link the voice of the customer to the financial performance of the

business. Walt Disney suggests that emotionally engaged customers are at least three times more likely to recommend a brand, three times more likely to re-purchase a product, less likely to shop around, and much less price sensitive.

## **6. Define Your Customer Experience Intent**

It's not enough to ask what a "good" experience is – the better question is what does your brand stand for? Once that is clear, delivery of great customer experience becomes a matter of effectively operationalizing your brand promise. This is why it is critical to develop your CX Statement of Intent to establish your shared understanding of your brand, mission, values, and to engage senior leadership in the process of what and how to deliver meaningful experiences that align with your brand and that have effective outcomes and measurements in place.

## **7. Listen to Your Customers**

Your customers' perceptions are the only reality that matters. The key ingredients to build a customer measurements model are:

- Measure customer feedback for your highest volume customer transaction processes (no more than 2-3 processes; e.g. customer service, inside sales, product delivery).
- Create a customer focused 'Quick Win' Dashboard that measures your customers' Moments of Truth (operational metrics; e.g. speed of answer of phones/emails, product delivery timeliness) – no more than 8-10 metrics at any one time.
- Implement a quarterly relationship survey with an 'index' that has a high correlation to your financial results and is easy for your employees to relate to and understand – your employees need to be able to find themselves in your customer measurement, so they can then be part of improving your customers' experience.
- Analyze the linkages between your operational metrics, relationship survey results, and your financial results - make the most of what you measure and track.
- Communicate results monthly to all colleagues and customers - be transparent and open.





So, what is the key takeaway? Link your customers' feedback to their behavior and your financial performance, and continue to build an overall predictive measurement model, which is monitored and updated on a regular basis.

## 8. Act on Customer Feedback

Surveys, journey maps, and other customer feedback will generate a lot of data so you need to set up a CX Team structure and processes for analyzing and taking action that will best improve your customer experience and financial outcomes.

- Establish a Steering Team with at least three C-Level executives, 3 Operational leaders from product, customer service, technology, and HR, as well as a few high potential and influential middle managers.
- Establish your CX Champion who will interpret customer feedback, develop the best metrics, ensure improvements are made, and report on results.
- Develop your CX Dashboard tracking the most important eight metrics linked from your customer journey map and which will help develop your Return on Investment (ROI) approach.

Example of a CX Dashboard:

Customer Metrics Dashboard		Current Period			Previous Period						
Customer Delight Goal		Goal	Q4 '12	Trend	Q3 '12	Q2 '12	Q1 '12	-	-	-	-
		XX	YY		YY	YY	YY	-	-	-	-
Customer Delight Driver	Customer Delight Metric	Goal	Jan '13	Trend	Dec '12	Nov '12	Oct '12	Sep '12	Aug '12	Jul '12	Jun '12
Information/Analysis Quality	Up-to-date	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
	Correctness	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
Product Reliability	Product Availability (uptime)	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
Customer Experience	First Contact Resolution	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
	Issues Resolved to Satisfaction	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
	Inside Sales Satisfaction	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
	Invoice Accuracy	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
	Delivery Timeliness	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%
	User Training Quality	XX%	YY%		YY%	YY%	YY%	YY%	YY%	YY%	YY%

## 9. Achieve ROCX (Return on CX)

At some point you will be asked to show a Return on Investment (ROI) for your CX activities and investments. Usually most CX programs begin with a “belief” that improving the customers’ experience will have operational and financial benefits to a company. As metrics start to improve, or deteriorate, you will need to measure the impact of what you are doing in revenue change, customer retention, and revenue per customer. It is always possible to measure ROCX, although it may not always be easy. By focusing on your customers pain points that are also a Moment of Truth from your customer journeys, you will most readily resolve issues that allow revenue growth. For more in-depth information, please [download our ROCX Report](#).

## 10. Communicate

- **Know your audience.** You want to be as distinct as possible in your audience groupings – and for each one you will determine the WILL (motivation) and SKILL (understanding) that each group has on your topic of Customer Experience. Will: “why should they care?” Skill: “what do they know or don’t know?”
- **Make people (team members and customers) the focus of your content.** Share WHO is doing what, which customers are benefiting from your CX initiatives, and team best practices. Connect the WHO in your communications to the audience you are targeting – talk about them, make them feel special and critical to what must happen to improve your customer experience.
- **Stay on message for at least 6 months straight.** Keep your CX messages simple, consistent and relevant. Start with **defining** your program; then discuss what the **initiatives** are and why they were chosen, then drill into the **team impact**, always link back to your company **values**, recognize “**Rock Stars**”, customer **wins**, and relevant **updates**.
- **Integrate your messages into multiple channels.** The objective of your **Customer Experience (CX) communication plan** should be that it is part of the overall company communication plan – not something different or adhoc. Leverage the company Intranet site, newsletters, CEO communications, and Website. ***If CX is truly a differentiator to your company, everyone should be talking about it.***
- **Evaluate the effectiveness of your communications.** Ask your audience for feedback via roundtables, CX communication surveys, town halls, employee surveys, etc. It is a great way to engage them and show their feedback is important. Are your customers telling you that their experience is

improving via customer surveys and financial results (retention, increase spend, new customers)? Effective communications are meant to drive the right behaviors that will positively impact your customers' experience.

### 11. Use training as a “wrapper” to your CX program.

Embed it into your company culture, ensure your culture and the importance of CX is understood and addressed in new employee training. Ongoing training is the best way to ensure behaviors and skills are embedded at all levels of an organization. Implement a persona-based training program to get the biggest impact from your training.



Having trained over 10,000 team members from onboarding new employees to engaging Board of Directors, these “best practices” have been helpful in launching the most impactful and FUN training to make your program sustainable and impactful. Make sure every team member knows he/she serves a customer; internal customers count!

- Address all learning styles (visual, audio, and kinesthetic) and needs (hearing and visually impaired)
- Get the right people with the right talents in the right roles – getting it right makes a HUGE difference
- Keep it fun, simple and engaging
- Smaller chunks are easier to digest and, most importantly, remember
- Brand your training
- Create real-life examples, role models and practices
- Repeat, repeat, repeat key learnings to build memory muscle
- Certify and re-certify participant knowledge through scored tests and certificates of achievement - make this feel ‘serious’ and important

## 12. Recognize & Reward Individuals

Your colleagues, team members, and associates are the “heart” of your Customer Delight efforts – they are your role models inside and outside your organization. The **#1 reason you cannot “delight” your customers is if you have unhappy colleagues** in your organization

Customer Delight programs must start with ensuring a happy and engaged colleague environment. **Recognizing** the people around you and reinforcing the behaviors you want to keep doing is a top priority in your leadership role, and the best way to ensure colleague engagement.

Create ways to recognize people on a daily, weekly, monthly, and annual basis. Recognizing and **rewarding** them with cash or gifts will really demonstrate that your customers’ experience matters and that your colleagues matter. Pay people for what you want to reinforce – we pay salespeople to sell so why don’t we pay people to “delight” our customers which increases revenue as well?

## Customer Experience Services Case Studies

1. **[CX Leaders Webinar: The Road to Customer Excellence](#)**  
Case Study: DTN’s COO Mark Holland gave us some great insights about the benefits of focusing the company culture on journey mapping and how that has improved customer experience and has had a great ROI.
2. **[How Employee Experience \(EX\) Impacts Customer Experience \(CX\)](#)**  
Case Study: Mazher Ahmed from Ortho Clinical Diagnostics shared his recent experience with developing employee journey maps. He talked about why understanding employees (internal customers) is one of the best ways to increase CX and company value.
3. **[Gaining CX Buy IN](#)**  
Case Study: Liz Bauer from CSG International gave a number of very important lessons in this CX Leader webinar. She talked about how to gain CX buy in from executives using ROI and share price. How CSG is driving real CX improvements by leveraging a strong CX Governance structure. And she talks about the multiple ways her company is changing to become more customer-obsessed.
4. **[CX Leader Webinar: Starkey Hearing Technologies](#)**  
Case Study: Starkey Hearing Technologies mission is “Serving Our Customers Better Than Anyone Else”. They walk you through how they used the customer journey mapping process to help them massively improve their customer

experience and drive positive results in their organization. “CX is not a department, it is a culture”.

5. **Journey Maps & VOC Surveys: How to Drive Action**

Case Study: Customer Vicky Stennes, Dir of Customer Experience & Retention, and Kim Chambers from CustomersFirst Now, provide great examples in a case study of how to drive action and financial results using journey mapping software and voice of the customer surveys.

## Top Customer Experience Services Webinars

1. **Employee Experience – A Critical Component of CX**

This is one of the most recent videos Kerri has made just last month, and it is quite popular already. In it she discusses how a great Employee Experience is so important because it empowers your entire organization to deliver better customer experience. Happy employees + Happy customers = better results all around.

2. **CX Design Principles Best Practices**

Align your brand and business strategy by utilizing experience design principles in your customer journey map touchpoints to help guide direction for real CX improvements.

3. **You have a CX Journey Map, NOW WHAT?**

Journey maps are often the first step a company takes to understand their customer’s experience. Journey mapping is a foundational methodology that supports strategic and operational improvements to your customer experience. Find out from two of the most experienced CX consultants how this is the next step in the evolution to best-in-class CX.

4. **CX is Not Only About Revenue**

Companies focus on Customer Experience (CX) mainly for revenue growth. But CX also helps reduce expenses and improve the effectiveness of your organization to lower your bottom line.

5. **CX Bootcamp Webinar**

CX terminology, tips, and journey map best practices. A great introductory overview of CX, journey mapping and VOC basics given by CustomersFirst Now CEO Kerri Nelson.

# CX Definitions

## Customer Experience

- Wikipedia - In commerce, customer experience is the product of an interaction between an organization and a customer over the duration of their relationship.
- Forrester - How customers perceive their interactions with your company.

## Customer Experience Services

- The planning, activities, and analysis done by both outside vendors and internal staff that proactively seeks to improve a company's overall customer experience, brand, and culture.

## Customer Experience Management (CEM)

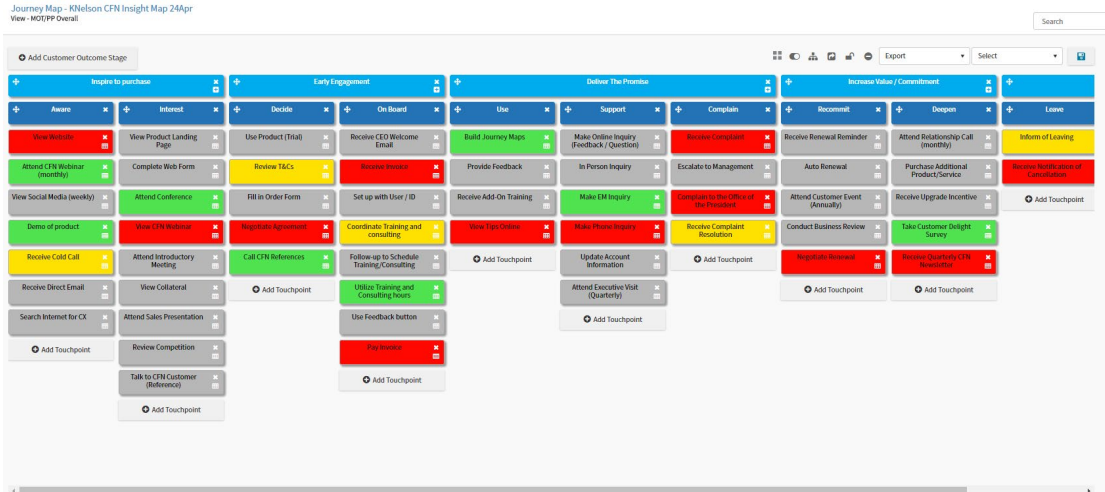
- The corporate program, systems, and processes involved with identifying, measuring, and improving the experience that prospects and customers have with an organization.

## Employee Experience

- Employee experience is defined the interactions between a company and the employees over the course of the employment relationship.
- Wikipedia - a set of psycho-cognitive sentiments about the experiential benefits of employment.
- Forrester - employees are satisfied - is the feeling that they're equipped with the tools and technologies that enable them to get meaningful work done efficiently.

## Journey Mapping

- A customer journey map is a diagram that depicts the touchpoints and stages customers go through when interacting with a company, from buying products online to accessing customer service on the phone to airing grievances on social media.
- A journey map is a visualization of the process that a person goes through in order to accomplish a goal.
- Customer journey maps are used by UX design teams and marketing (as well as other business departments) to better understand their customers. The idea is a simple one, to map the relationship between a customer and an organization over time and across all channels that they interact with the business on. It is always depicted from the customers' expectation.



## Touchpoints

- A point of contact or interaction, especially between a business and its customers and prospects.
- "Touchpoint Guru" Hank Brigman defines a touchpoint as an influential action initiated by a communication, a human contact or a physical or sensory interaction. Each touchpoint is a message that literally "touches" a customer in some way. Collectively, touchpoints create the customer's experience.

## Moment of Truth

- These are touchpoints that are pivotal to the customer and to their relationship with the company.
- The critical touchpoints in the journey where the member's perception of the experience most significantly affects their attitude of you (positively or negatively).
- Usually there is higher emotion, importance, user involvement, value, and expectations during this touchpoint.
- The consequence of this touchpoint may be a customer decision point to continue doing business with the company or not.

## Pain Point

- The touchpoints in the journey where the member experiences irritation, inconvenience, or frustration.

## Voice of the Customer (VOC)

- Voice of the Customer is a term used in business and Information Technology to describe the in-depth process of capturing customer's expectations, preferences and aversions.

- Voice of the Customer is a term that describes your customer's feedback about their experiences with and expectations for your products or services.
- Voice of the Customer refers to the way an organization collects customer feedback, analyzes the data, distributes it to the right people and takes action on these insights in order to generate financial benefits.
- Voice of the Customer programs aim to gather and analyze customer insights and enable a company to take action in order to improve customer experience (CX) and deliver positive business outcomes to the organization.

### **CX Analytics**

- Analytics, in general, is about understanding data, deriving insights based on this data in order to achieve a specific purpose. When it comes to CX Analytics, this purpose is to understand customers better and the experience you as a brand deliver to these customers.

### **CX Governance**

- A critical component of a CX Program that ensures ongoing success. An establishment of policies, and continuous monitoring of their proper implementation, by the members of the governing body of an organization.
- 4 pillars - 1. Define your goals and document them 2. The C-suite needs to own the customer experience 3. Put together a team of CX champions 4. CX needs to be everywhere.

### **ROI (Return on Investment)**

- The ability to generate enough incremental revenue for incremental expense that justifies the expense over time.

## **CX Learning Resources**

- [CustomerExperienceUpdate](#)
- <https://www.qualtrics.com/xm-institute/>

## **CX Industry Analysts**

- [Aragon Research](#)
- [Ventana Research](#)
- [Forrester](#)
- [Gartner](#)



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