Q&A

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How to Drive Organization-wide Support for CX Management

A Q&A with Forrester Senior Analyst Faith Adams

Introduction

Customer Experience (CX) management is a must-have in the Feedback Economy. Without a strategic approach to managing and optimizing CX across every customer touchpoint, organizations leave their reputations and business success to chance.

However, according to Forrester research, CX professionals don't have the support they need to implement effective CX management programs, even though the majority of executives say CX is critical.

In this Q&A, Faith Adams, Senior Analyst at Forrester:

- **Discusses how CX professionals can actively involve executives in their mission to improve CX.**

- **Provides recommendations for engaging stakeholders to act on CX initiatives.**

- **Explains the importance of allotting budget to technology and resources that support them.**

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Faith Adams
Senior Analyst, Forrester

Q How do you suggest we get everyone on the same page about what Customer Experience (CX) is — and isn't?

A **It can be as simple as starting with a level-setting activity and having an open dialog with stakeholders about what it is — and isn't.**

Some will start by having a conversation and asking others, "What does CX mean to you?" or "How do you define CX?" Others may do a CX road show and use it as a part of a larger, informative CX campaign. With either approach, it becomes an opportunity to have a conversation and simplify the definition of what CX actually is, which is — how customers perceive their interactions with your company. When others hear this, it is usually easy for them to establish a connection to the definition because it is so simple and clear. It does not make it more complex than it needs to be.

Until CX becomes mature, these conversations should continue to happen. We have seen some organizations that need to be reminded that CX is not just about giving a few customers white-glove treatment or service — that it is about doing greater good that leads to improved CX overall. We have also seen some organizations where CX gets a bad rap because there is an assumption that CX only costs organizations more money; in fact, when approached strategically, it can avoid costs, lead to savings, reduce customer churn, improve customer loyalty, and more (from a business outcomes perspective). Another benefit is that CX can help create or influence a customer-centric culture.

CX is how customers perceive their interactions with your company.

- Faith Adams

Q How can we establish leadership buy-in to take a more innovative approach when it comes to listening to our customers?

A **This is a tough one — and a lot of organizations still struggle with this.**

According to our research, there is a shortage of executive buy-in and support, with more than a quarter of CX pros reporting that they did not have executive involvement or support. In addition, 55% noted that although executives say that CX is important, it is just lip service because they don't act accordingly. But we also see companies that do have support and as such, they can evolve things like their Voice of the Customer (VoC) programs.

For example, in "The Top 10 Trends Among VoC Leaders, 2019," we noted that "successful VoC programs get ongoing support from the top of the organization" and that this commitment by leadership helps drive positive change by demonstrating that the VoC program is not a lip-service effort but that CX is truly a top priority. Actively involved executives help set the tone for the program, make decisions, and constantly champion the customer. So sometimes it may be a matter of finding that executive leader that helps send the message that CX is a focus.

Leaders can often be metrics obsessed — or scorecard obsessed.

So helping them move from metrics to meaning is important, or helping them understand the "why" behind things. This can be done by tapping into the power of unstructured and unsolicited feedback that tells the story about how customers feel. This information can help them accept the truth and see a need to change — since the metrics and the story behind them are not always aligned.

Another way to help leaders get on board with change is focusing on the outcomes and ROI of CX-related activities.

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Q How can we engage stakeholders to act and change?

A Engaging stakeholders means understanding what is important to them.

At Forrester, we talk about engaging three different audiences — the unengaged, unfocused, and underutilized — in different ways. By tapping into what makes your people tick, you can identify the actions that need to be taken to engage them. These three groups are defined as:[ii]

Unengaged.

These employees don't know why they should pay attention to what their VoC team is doing, let alone how to incorporate the customer perspective into their decision making.

Unfocused.

Employees in this group read the VoC reports they receive with interest but aren't sure how to act on the information. They don't know how to prioritize issues, identify root causes, or systematically make improvements.

Underutilized.

Employees in this group are already avid users of VoC insights. They want to get faster and smarter about taking their customers' experience to the next level, but they don't have the tools they'd need to do that.

ii See the Forrester report "How To Drive Action With Your VoC Program."

Engage them by:

- **Motivating the unengaged through emotion and logic.** CX professionals need to help stakeholders adopt an outside-in perspective to connect them to how their customers feel about their experience and explain why VoC matters to the business.

- **Guiding the unfocused with actionable insights.** CX professionals can enable these individuals to act by putting in place processes and tools to help identify issues and make changes.

- **Empowering the underutilized with advanced tools.** To boost these individuals' effectiveness, CX professionals need to make it possible for them to prevent problems before they occur and embed VoC data in business decisions. Different vehicles can help here. For example, CX teams can motivate the unengaged by using customer verbatims coming from social media.
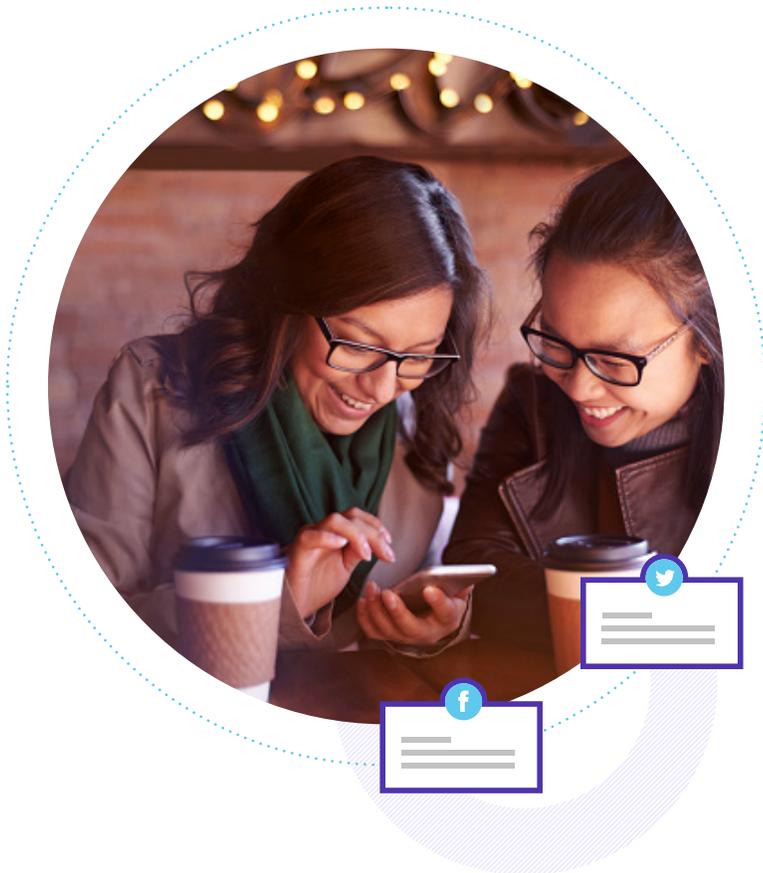
Unstructured and Unsolicited Feedback

Think about it: VoC surveys invite customers to share their feedback about specific topics at specific times. The unstructured and unsolicited feedback coming from social media helps provide more context, including customer emotions — and it can be both positive and negative feedback (so it does not focus only on what needs to be improved).[iii]

iii See the Forrester report "Humanize Feedback To Drive VoC Engagement And Action."

Q Budget is always a concern. How can we start to make the case for another tool?

A Even though budget is a concern, it does not have to be.

A lot of organizations are spending more on tools and technologies that they are not using to the fullest, so if you happen to know that these tools exist in your organization, use them to your advantage to bring in a vendor that can bring more value to your program. I recommend that companies regularly assess their maturity, identify where gaps exist in what they are doing, and aim to fill the gaps. Organizations must always have an eye on what's next.

Your Tech Stack

We also talk about investing in technologies that support the evolution of your program — so if there are tools available that can trim down your tech stack because of certain specialized features and capabilities — in addition to the table stakes features — that is a great opportunity to highlight the need for a change (or to streamline vendors).

Q How do you work with different databases and technology systems that don't talk to each other and have different but similar data points?

A **In most cases, it is about implementation and then integrations.**

And integrations are crucial to success in this space, but they are also something that can be oversold by vendors; vendors can oversimplify how easy it can be to integrate with an API. In fact, it is not easy, and in some cases, integration will add a pretty high dollar amount to your contract. Make sure you vet the vendors that you are looking at and confirm that they can do what they say they are going to do.

In addition, services and some outside help can be important here, and many vendors don't focus on the criticality of services; the technology is not the only thing that matters. The right vendor will enable you to work with different tools and systems in a way that helps you take your program to the next level.

About Faith Adams

Senior Analyst, Forrester

Faith Adams is an analyst at Forrester Research, serving Customer Experience Professionals. Her research focus areas include customer experience measurement and customer-centric culture.

Prior to joining the research team, Faith spent nine years working in customer and patient experience. Most recently, she was the customer experience director in the insurance division of John Hancock, where she led the implementation of a customer experience measurement system. Leveraging the voice of the customer, she helped establish a different approach to building loyalty, increasing customer lifetime value and improving the bottom line while also assisting in the development of a more customer-centric culture.

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