



## Assessment

1. Do your senior leaders consistently tear down silos and involve one another in decisions that impact the customer?

YES      SOMETIMES/MAYBE      NO

2. Do you collect customer feedback through a centralized system?

YES      SOMETIMES/MAYBE      NO

3. Do leaders know what matters most to your customer?

YES      SOMETIMES/MAYBE      NO

4. Does your organization have a CX strategy or North Star?

YES      SOMETIMES/MAYBE      NO

5. Has your organization engaged in customer and employee journey mapping and communicated these journeys across the organization?

YES      SOMETIMES/MAYBE      NO

6. Does your organization regularly test and learn new concepts, products, or services?

YES      SOMETIMES/MAYBE      NO

7. Does your organization have a formal system in place to gather associate feedback and best practices?

YES      SOMETIMES/MAYBE      NO

8. Do you ever act on or scale employee suggestions to improve the customer experience?

YES      SOMETIMES/MAYBE      NO

9. Do most managers know what to do with customer data?

YES      SOMETIMES/MAYBE      NO

10. Do most managers know what matters most to customers?

YES      SOMETIMES/MAYBE      NO

11. Do most managers share CX data with frontline employees daily?

YES      SOMETIMES/MAYBE      NO

12. Do managers know how to coach their teams to deliver on customer feedback?

YES      SOMETIMES/MAYBE      NO

13. Does your organization have a recognition program that supports your customer experience strategy?

YES      SOMETIMES/MAYBE      NO

14. Do you have systems or processes in place to get real-time updates on products or policies to your front line?

YES      SOMETIMES/MAYBE      NO

15. Does your senior leadership team buy in to the business case behind investing in EX and CX?

YES      SOMETIMES/MAYBE      NO

## Scoring

Review your answers and tally the score. Award yourself points based on the following:

**YES = 2 points** | **SOMETIMES/MAYBE = 1 point** | **NO = 0 points**

Add up your score to determine your CX Maturity level, then read the corresponding tips.

0-9  
TOTAL POINTS

10-24  
TOTAL POINTS

25-30  
TOTAL POINTS



# IMMATURE

## CUSTOMER EXPERIENCE MATURITY

### How do I know my company is here?

- We don't have a centralized or coordinated way to gather feedback.
- We don't have a central team dedicated to CX.
- We don't do customer or employee journey mapping (or it is limited).
- We don't test and learn with customers.
- Our senior leaders work in silos and do not collectively own the CX experience.
- Our managers don't have access to real-time CX data outside of social media.
- Our managers don't empower employees to do what's right for customers.
- Our employees don't know what matters most in the customer journey.
- Our employees don't know the levers to pull to create and sustain customer loyalty.

### Where do I start?

- **Have a conversation – and then keep having them!**
  - » Make the business case, ensuring leaders see the value of strong customer and employee experience using data and real stories from your people.
  - » Highlight the examples where silos have negatively affected the customer experience. Consider the places where the messages from marketing, HR, operations, and finance were disconnected or in conflict.
  - » Ensure customers, front-line employees, and managers have a literal or figurative seat at the strategy table.
- **Give people a voice**
  - » Invest in a Voice of Customer system. It should include a centralized means to collect and analyze customer data, which will help you to uncover what matters to your most loyal and profitable customers. Share what you learn with all levels of the organization.
  - » Invest in a Voice of Employee system. You can't deliver a great customer experience without knowing what motivates and engages your employees who will deliver that experience.
- **Define a North Star**
  - » Align on an ideal customer experience vision that includes each step of the entire journey and aligns with your brand and your purpose.
  - » Check every decision against this North Star. If the decision doesn't serve your purpose and brand, reconsider.
- **Develop managers to be Chief Activation Officers**
  - » Adjust existing leadership development training to ensure managers know their role in engaging and motivating employees to deliver "above and beyond" service to customers and clients.
  - » Shout results from the rooftops.
  - » Recognize behaviors from managers who engage employees and from employees who engage customers.
  - » Link those observable behaviors to the impact they have on CX metrics.



# SOMEWHAT MATURE

## CUSTOMER EXPERIENCE MATURITY

### How do I know my company is here?

- We have centralized CX data but don't do much with it.
- We've mapped the customer journey, but we haven't articulated what matters most to our customers at each step.
- Only one department owns CX metrics on their scorecard.
- We are slow to innovate because we search for perfect before testing with customers.
- Managers don't know how to interpret and act on customer feedback.
- Managers are constantly putting out fires rather than proactively using data to improve the experience.
- Employees see CX data but aren't sure how they make an impact.
- Employees share ideas for improvement but not in a regular or consistent manner.

### Where do I start?

First, ensure you've implemented the tactics from the **Immature** stage, then:

- **Focus on what matters most**
  - » Map where your customer and employee journeys intersect to identify friction points.
  - » Analyze your customer data and identify the moments that matter most to customers and employees alike. For example, what moments are statistically proven to make a customer a promoter?
- **Embed the culture enablers**
  - » Identify and scale behavior success routines for customer-facing employees who deliver on the moments that matter most.
  - » Create and scale leadership success routines for managers to build a culture of empowered, engaged, and customer-centric employees.
- **Build business acumen**
  - » Teach managers how to slice and interpret customer data, focusing on the moments that matter to customers and employees.
- **Crowdsource ideas**
  - » Great ideas come from all levels of the organization. Create channels for ideas from the front line to be heard.
  - » Instill in managers that part of driving a great customer experience is creating an open environment in which employees feel empowered to make decisions on behalf of the customer.
  - » Be clear in your guidelines and guardrails, giving employees space to innovate within those lines to create memorable moments for customers.



# MATURE

## CUSTOMER EXPERIENCE MATURITY

### How do I know my company is here?

- We are looking to be an industry leader/first to change.
- We have data and know what matters most to customers and employees.
- We use data to guide many of our CX decisions (though we could still move faster.)
- We acknowledge the need to test and rapidly iterate with customers.
- Senior leaders own the whole before their piece, and they prioritize investment to improve the EX and CX.
- Managers have easy access and know how to use data to improve the customer experience.
- Managers monitor the data daily and share it often with employees.
- Managers actively seek out ideas from frontline employees and pass them to leaders.
- Employees are well-versed in the data and know how they drive change.
- Employees are curious about customers and continually look for ideas to improve the CX and share those with managers and leaders.

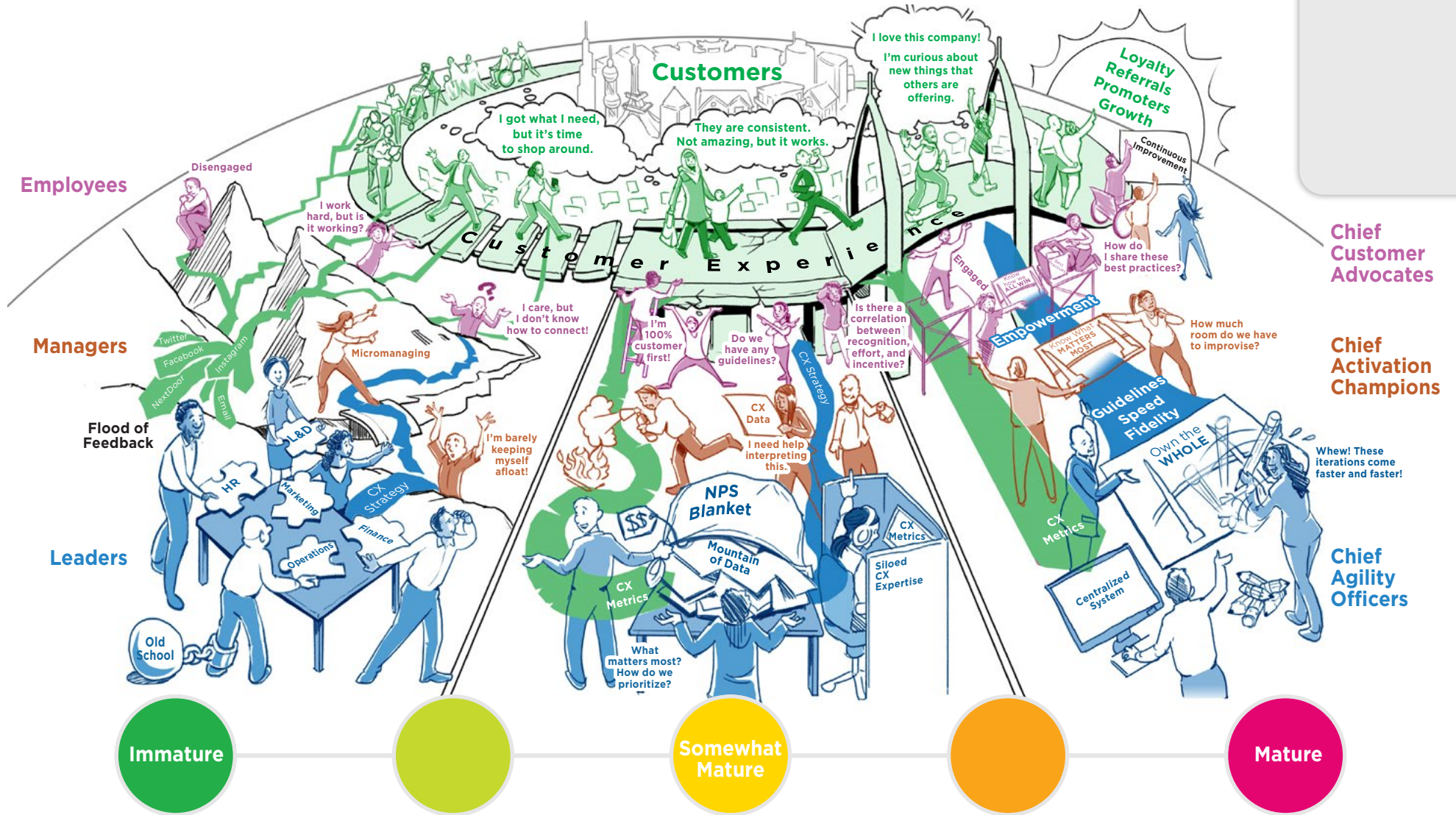
### Where do I start?

First, ensure you've implemented the tactics from the **Immature** and **Somewhat Mature** stages, then:

- **Amp up the agility**
  - » Establish an expectation with associated metrics for teams to work collaboratively and quickly to test and iterate on new customer experience concepts.
  - » Create MVP “guardrails” to align on what fidelity is OK to test with customers. This frees up your team to test and learn, rather than get mired in perfecting a single concept at a time.
- **Invest in two-way communication**
  - » Establish multi-channel communication in your organization to ensure everyone is up to speed.
  - » Share up-to-the minute changes with your front line and solicit their best practices and lessons learned in real time.
- **Get creative**
  - » Develop user-centered design mindsets and practices across the organization. Host workshops and create training to help everyone in your organization prototype, iterate, and ultimately move with more agility.



# Customer Experience Maturity



## Discussion Questions

- What is causing this current state?
- What is the impact of this current state on the **employee** experience?
- What is the impact of this current state on the **customer** experience?
- What does this company need to focus on?
- What could be stopping this company from making progress? What is holding them back?



# Customer Experience Maturity

## Comments From Your Session

### WHAT DO YOU SEE IN THE VISUAL?

- The groups have different names: Leaders on one side, Chief Agility Officer on the other, etc.
- Leaders shackled to the "Old School" ball and chain.
- Chaos versus structure/alignment.
- In immature, the team members are working hard but unsure if what they are doing is working.
- There can be a great deal of chaos in a CX program give the scope across company.
- Transition from unstructured to formalized.
- Poor disengaged person on a mountain...alone.
- The "I'm 100% customer first" employee and the fire extinguisher.
- Conflicting priorities.
- The path gets more direct as you move to maturity.
- Starting from the left, the desire to be strong in CX but not knowing where to start. Moving right, prioritizing CX changes, making changes. Further right, determining effectiveness and continuing to improve.
- Visually it looks like CX brings all the efforts together in the same direction.
- Intentionality to address CX.
- Flood of feedback on the immature side is more organized in other segments.
- What stands out is how the internal experience has such a powerful impact on the external customer experience.
- How critical the employees are to impacting/improving the guest experience.
- Progression of teamwork: employee engagement rises as customer engagement and satisfaction/mission to customer is emphasized.
- Mountain of data.
- Is likely a complex journey to make improvement and eventually achieving goal(s). Many moving parts.
- Somewhat mature - they are consistent. Not amazing, but it works. I think so many business owners this year have shifted to task versus strategic mentality and have paid in terms of Promoters, Referrals, and Loyalty.
- Maybe not getting the results they want? Employee frustration.
- Leadership likely supports, but all components are not refined yet and execution varies.
- Lack of clear vision.
- Trust and communication.
- Everyone is paying attention to something different.



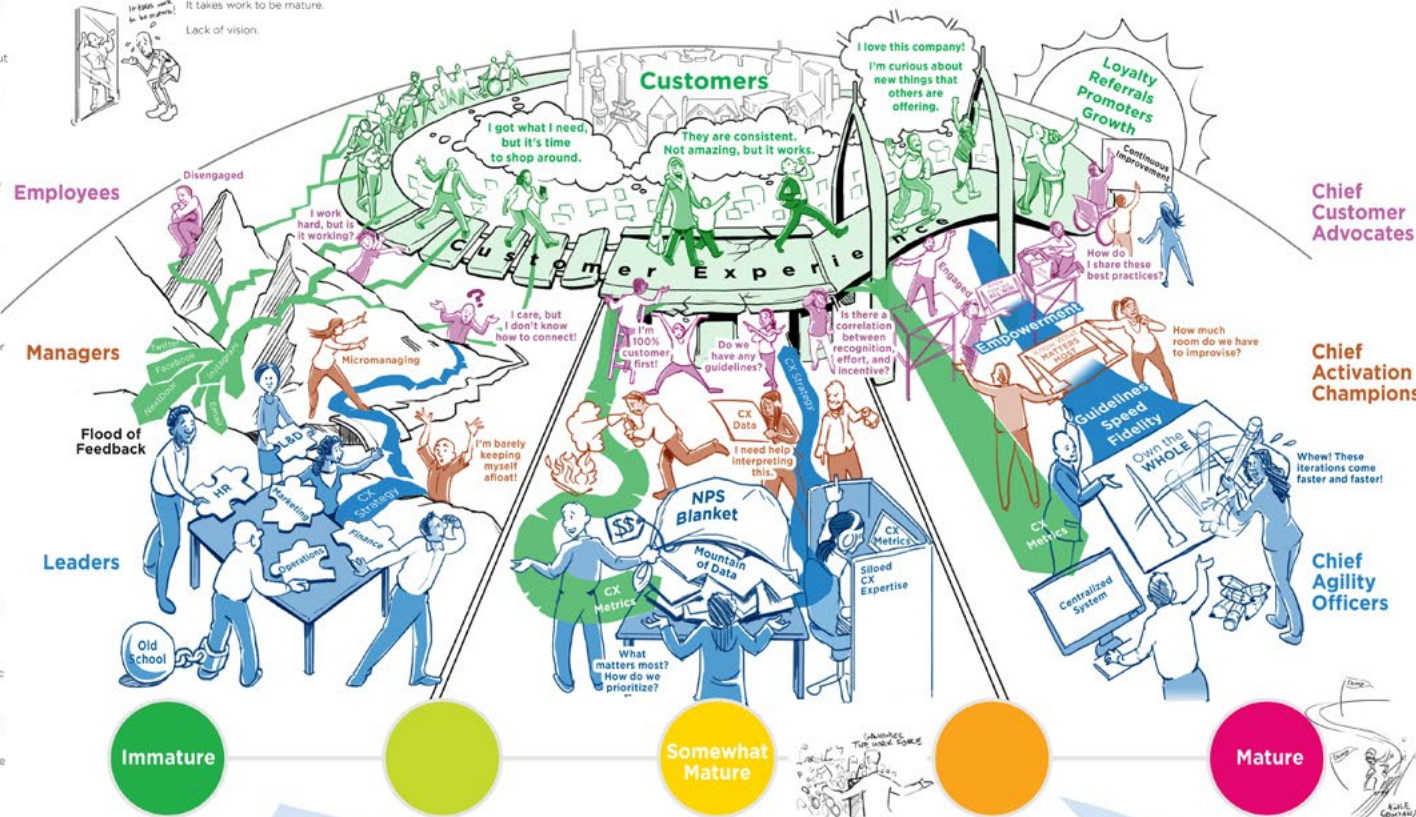
### WHAT HOLDS YOUR ORGANIZATION BACK?

- Caught up in day to day instead of thinking towards the future and establishing vision.
- COVID impact on staffing levels (healthcare company).
- My friend says too many other priorities.
- Fear holds organizations back.
- It takes work to be mature.
- Lack of vision.



Lack of vision and willingness to be uncomfortable and challenge long-held norms.

- Employees think they know what customers want better than the customers.
- Most things needing to be reviewed and approved by a few people.
- Open listening.



### WHAT DOES THIS FICTITIOUS ORGANIZATION NEED TO DO TO MOVE TO MATURE?



- Identify where the gaps are in the program.
- Understand WHY they are there to do what they're doing.
- Get clarity around reality, and changes that need to be made and come together as a cohesive group to put change in action.
- Identify what matters most.
- Measuring customer feedback and taking action as a team.
- Come together and rally around a common mission (get Root's help)?
- Reinvent themselves if they are not offering what customers now want.
- Let the end experience of customers drive changes and alignment to internal processes and goals.
- Determine how you are going to capture the current state of the customer experience? Prioritize what is the most impactful change to make to get the most bang for your buck...continue the loop.
- Integrate the CX information better into the employee support - use the information better.
- Candid discussion and clarity around the mission and what employees might be asked to do within or outside of traditional roles. Prioritize and execute.
- Identify the most important priorities and make sure you are working through each with everyone and before moving on.
- Start by developing a coherent strategy about the EX and CX they're after and how that drives employee and customer value.
- Tie metrics to performance review.

### IMPACT ON EMPLOYEE EXPERIENCE

- Lack of uniformity and consistency.
- Lack of clarity in goal is frustrating.
- Employee begin to doubt whether we really care about the customer.
- Not rallying around common mission.
- Frustration.
- Inefficiencies, redundancies in work.
- Confusion and frustration.
- Inefficiencies.
- Hamster wheel OR disengagement. Two extremes.
- Frustration and can become disengaged.
- Is it a metric or a mission?
- Turnover increases.
- People check out and revert back to the things they are most comfortable doing (away from the change).
- Can become disengaged which can then impact the CX.
- The row boat in the river is going everywhere because all employees are rowing in a different direction every day! That sucks the fun out of a job pretty quickly.
- Feeling the organization is not allowing them to be empowered to make changes they think are needed.
- Desire with no focus leads to frustration.
- When employees finally understand it and see how to do it, it creates purpose and empowerment.

### IMPACT ON CUSTOMER EXPERIENCE

- Question why they should remain loyal to your organization.
- Value for money.
- They can pick up on our stress.
- Customer is probably feeling friction (as service delivery is most likely not seamless); may be prone to leave you.
- A disconnected experience, potentially multiple touchpoints, lack of consistency.
- Customers may not like being asked what they want and then not seeing immediate changes.
- Fearful and rudderless.
- Customers want to consume from businesses that take care of their employees - and they know when it's happening and when it is not.
- When customers reach out, they don't know what they're going to get.
- Unclear around brand/quality/consistency.
- Customers want you to get it right, consistently!

