

# Evaluating Customer Experience - Part 2

## How?

### How to be a CX-led organisation

In the last article we looked at the reasons why it is important to focus on customer experience. This time, we'll consider the steps that need to be taken to ensure that you properly evaluate your customer experience.



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### Be authentic

It's easy to say that we care about our customer experience and having a 'Customer Experience mission statement' is a great start. Actually doing something about your CX can require a cultural shift that needs to be driven from the executive down.

*"Having a customer-obsessed operating model is one thing, but leading the organization to execute it effectively is another. The best leaders will do both."*  
Forrester Research

Behonestaboutyourorganisation. Does it genuinely promote the kind of empowerment that enables your staff to resolve issues in one contact? Do you have the right skills on your team? If there are barriers in place that require staff to double check, get approval, go up the chain or simply seek information then these delays are likely to cause frustration for your customers. If people have the information to answer questions, the power to complete transactions and the empowerment to resolve problems then your customers will surely have a great experience. Your people will thank you for it too. Investing in and trusting in

the people in your organisation is the key to long term customer satisfaction.

Investing in your people sounds expensive, but customers are used to self-serving these days. While some prefer the reassurance of a friendly human voice, many customers would rather not even speak to an individual. Can all of your most fundamental customer journeys be carried out to successful completion online? Over the phone? In person? By email or web chat? At some point you may well be asking your customers to switch contact method in order to suit your processes; to sacrifice their convenience for yours. To really care about customer experience is to remove barriers and get the job done. To remember what a small part of their lives you are and just how crucial they are to you.

*'Three quarters of customers expect "now" service within five minutes of making contact online'.* McKinsey

It simply isn't enough to say, "We care about customer experience," and hope that something rubs off on your people so that they will fill the gaps in your journeys.



## Be scientific

It's very easy to go with a gut feeling. After all, you're the boss – you've been in this business long enough to see what's going on and you trust yourself to make great decisions. Maybe you're already looking at data and it's telling you exactly what you know. Beware of confirmation bias. This is the tendency to seek, interpret, favour, and recall information that confirms what you already believe to be true. We are all susceptible to confirmation bias as finding data that supports our own hypotheses makes us feel smart – and who doesn't want to feel smart?

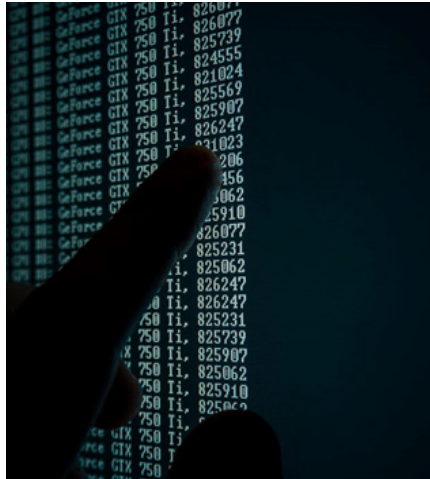


*"It is a capital mistake to theorize before you have all the evidence. It biases the judgment."*

*"It is a capital mistake to theorize before one has data. Insensibly one begins to twist facts to suit theories, instead of theories to suit facts."*

Arthur Conan Doyle / Sherlock Holmes

To be smart, we have to uncover information we didn't already know. Data and insight are your friends. Focussing (initially) on your key customer segments and journeys, gather data and analyse it forensically to understand where the strengths and weaknesses are in your organisation.



Your data must consist of measurable metrics and you should consider your key customer segments and their intentions while traversing your customer journeys.

You should collect your data on an ongoing basis, not just as a one-off exercise so that you can see trends such as a significant worsening of a situation or (more positively) the successful effects that your changes are having on your organisation. Measurement should happen often (in real time is ideal, but not always possible). This will alert you to problems sooner, while keeping the momentum of your customer experience programme going. It is common for efforts to tail off when the quarterly measurements come around and you find you are too busy. It is easier to create habits around daily or weekly metrics. By tying the measurements to business outcomes rather than activity, we can stay focussed on the thing that matters. We are free to abandon activities that do not produce the outcomes we desire, even though it feels like they should be working. Positive social media posts

about our brand may make it seem like we are heading in the right direction, but they are no substitute for measuring new business that has come directly from customer referrals. We will cover more on the metrics themselves in the next blog post.

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## Involve everybody

Making the decision to become a customer experience centric business can be a seismic change for most organisations, even those that believe they are focussed on customers. This is not something you can do alone. In fact, it is usually not something you can do without everybody doing their bit. Putting customer experience at the centre of your business means that everybody in the business must shift their thinking to customer intent, journeys and outcomes. This must be at the heart of company culture. It doesn't matter that some departments do not deal directly with the customer, because they will influence the culture and the actions of those that do, either by producing enabling processes and technology, through training and support or by facilitating an environment that is conducive to meeting customer needs.

So as well as the operational teams, you'll want to make sure you are capturing data from your change and IT teams, your legal and finance teams, human resources and even (ulp!) the executives! After all, cultural change has to come from the very top.

*"Engaged employees out-perform disengaged employees in key areas and organisations with leading CX have 50% more engaged employees."*

Experience Matters

Once you have a handle on your measurements, you can move to set some targets for improvement. It's good to be challenging here, but also realistic. This can take some time and some work as you figure out what the normal ranges are for your measurements. However, once you have regular measurements and targets it is important to share these with the whole organisation (and maybe even outside your organisation) so that everybody can review their performance against targets. It's a signal to everybody that you mean business.



If you discover that you've set an unrealistic target – don't be afraid to review it. You don't want to demoralise your staff. Try to find out why it is unrealistic – perhaps there's a signal that a more fundamental change is required. Maybe the reason why your expectations are not considered realistic is because there is some artificial blocker or constraint in place which you can move. Remember – this is your chance to be authentic and signal your intent! Involving everybody can mean looking beyond your team.

Perhaps you don't have data scientists residing in your back office. These highly trained information wizards can help you visualise your measurements, using the correct statistical model or graphical representation, and then work out correlations behind them. Sometimes the insight you seek can come from outside. Finally, identifying issues and acting on them is the fundamental principle behind CX evaluation. This is another opportunity for everybody to be involved. There will be individuals in every team that rise above the operational process to gain insight into what is working for customers and what is not. These individuals are your champions of CX and together they can make a formidable cross-functional CX team. Using this resource in conjunction with the business-focussed measures is key to achieving success.

Having covered the 'why' in part 1 and the 'how' in part 2, we look in the next article at what kinds of measures to track in order to give you a strong and useful evaluation of your customer experience.