

THE CUSTOMER EXPERIENCE

*Superhero Success
Guide*





A Letter from **THE CXPA** **CO-FOUNDERS**



When we set out to establish an association for Customer Experience Professionals our goals were to establish Customer Experience as a recognized profession and career, and to offer a community and resources to advance this goal. We set out to build a community where we could share best practices and support one another in this endeavour.

Over the past five years, the CXPA has grown rapidly worldwide as an epicenter for customer experience professionals; providing essential education, resources and networking to our members. For example, in 2014 we introduced the Certified Customer Experience Professional (CCXP), a designation for practitioners who want to be recognized for their expertise and skills while defining standards and best practices for the industry.

This CCXP designation establishes six core competencies sanctioned by the CXPA as critical for success as a Customer Experience Professional:

- Customer Centric Culture
- Experience Design and Innovation
- Voice of the Customer, Customer Insights and Understanding
- CX Strategy
- Metrics, Measurement and ROI
- Organizational Adoption and Accountability

In this eBook, we celebrate twenty-one certified CX professionals who have all faced challenges and established solutions that have improved the customer experience inside their organizations. The common denominator you will find in each of their stories is passion, a deliberate and focused path, and the ability to engage leaders and their organizations.

Their stories highlight the power of elevating the discipline of customer experience in the advancement of business growth, and validate the importance of the CXPA community as a resource to assist in achieving these results.

Thank you to our fellow CXPA members for continuing to share and support one another on this journey.

Jeanne Bliss

Bruce Temkin

What we heard



Across the globe, the CXPA brings together business professionals that demonstrate persistence, passion, optimism, and business acumen, with an eye for data and metrics.

This eBook profiles twenty-one customer experience professionals, CX Superheroes, who have dug deeper into the challenges they've faced and the methods they've developed to successfully drive forward toward inspiring corporate culture, gaining leadership support, crossing silos, and listening to both customers and employees.

As more businesses seek to implement practices that focus on customer experience and value employee engagement, it becomes critical to recognize the expertise and knowledge behind the discipline. Some of the themes you'll find repeated across the interviews with these CX Superheroes include:

The Power of Leadership Support


Many of our CX Superheroes credit a leader within the organization for sponsoring the customer experience efforts and making it a priority. From adoption to participation, executive level focus and engagement is deemed critical.

Corporate Cultures

Across the board there was a common theme regarding understanding corporate culture at an organizational level and introducing efforts that would work within that culture to begin creating change. Our CX Superheroes described how they looked for examples and then adapted them to meet the needs of their companies and the culture.

The Importance of Consistency

The importance of consistency was stressed by a number of our CX Superheroes. From consistency in approach to consistency with keeping CX initiatives top-of-mind and a priority within leadership, it was critical that CX professionals strived to maintain an approach that continued to move forward at a reasonable pace without racing ahead or losing track of the momentum.





Resilience

All of the CX Superheroes were quick to point out others within the organization that played an essential role in the customer experience success they observed. While quick to showcase others, they were more hesitant to speak about what it has taken them to help facilitate change. There is clearly a certain resilience and passion that a successful CX professional exhibits.

A Lot with Little

A wide range of initiatives is described throughout this eBook, and many of them showcase the power of change even if there was very little money and resources available. From technology to manpower, many of the CX Superheroes started with limited resources and garnered more and more as they were able to prove their case through small victories. The idea that a lack of resources shouldn't hold a CX professional back is echoed throughout these stories.

Storytelling is Powerful

The power of a story to connect humans emotionally is recognized and utilized quite frequently by our CX Superheroes. Throughout the examples in this eBook, there are many cases where storytelling has been used to encourage employee engagement and elicit customer empathy.

Inspire and Inform

The twenty-one stories within this eBook are meant to inspire and inform on the experiences and lessons learned from just a few customer experience professionals. Those showcased here are by no means the only ones within this exciting space that are conquering incredible feats and serving as passionate change agents. With the purpose and mission of CXPA in mind, the hope is that their stories will more clearly highlight the passion and skillset among all customer experience professionals.

Meet the **SUPERHEROES**

These are just a few of the everyday superheroes working to change culture and better customer experience. We are sure they would be the first to tell you it takes a team. There are many more amazing professionals working in the field of customer experience and we are fortunate to learn and share from each other through the CXPA.



Michael Bellis

Customer Experience Lead, Pfizer Europe

SUPERPOWER: Resilience



Nancy Porte

Vice President, Global Customer Experience, Verint

SUPERPOWER: Silo Crusher



Karen Mangia

Senior Director, Cisco Systems

SUPERPOWER: Passion for the Customer



Mark Slatin

Senior Vice President, Director of Client Services, Sandy Spring Bank

SUPERPOWER: The Supersonic Call



Mike Wittenstein

Founder and Lead Experience Designer, Storyminers

SUPERPOWER: Human-centered experience design



Annette Franz

Director, Customer Outcomes, Fidelity Investments

SUPERPOWER: Teaching and inspiring



Terry Callanan

Chief Quality Officer, Carestream Health

SUPERPOWER: Passion



Michelle Morris Freet

Associate Director of Client Experience, Crowe Horwath, LLP

SUPERPOWER: Amplifier



Lisa Crymes

CCXP Chief Experience Officer, DST Health Solutions

SUPERPOWER: Listening



Ron Taylor

Vice President, Customer Support, Sage

SUPERPOWER: Navigating the Organisational Structure



Karl Sharicz

Founder & Principal, CX Partners, LLC

SUPERPOWER: The Art of Listening



Kristin Guthrie

Vice President, Customer Experience, Honeywell Aerospace

SUPERPOWER: X-Ray Vision



Brian Gnatt

Assistant Vice President, Customer Experience, University of Maryland
University College

SUPERPOWER: CX-Ray Vision



Z Clark

Business Operations Analyst, Navy Federal Credit Union

SUPERPOWER: Helping people clarify their data requirements



Sonya McAllister

Principal/ Senior Vice President, Walker Information

SUPERPOWER: The Power of Persuasion



Ian Golding

Managing Consultant, Customer Experience Consultancy, Ltd.

SUPERPOWER: Empathy, Credibility, Authenticity with a bit of Madness



Lynn Hunsaker

Customer Experience ROI Strategist, Clear Action

SUPERPOWER: Pulling People Together



Erin Wallace

Global Manager, Customer Experience, John Deere

SUPERPOWER: Super Glue



Jason Kapel

CCXP, Customer Strategy Program Manager, Prudential Individual Life Insurance

SUPERPOWER: Storytelling



Sandra Fornasier

Global Director, Customer Experience Specialists, Ciena Corporation

SUPERPOWER: Passion and being fearless



Karyn Furstman

Chairman, Customer Experience Professionals Association

SUPERPOWER: Super Glue

MIKE BELLIS

Customer Experience Lead

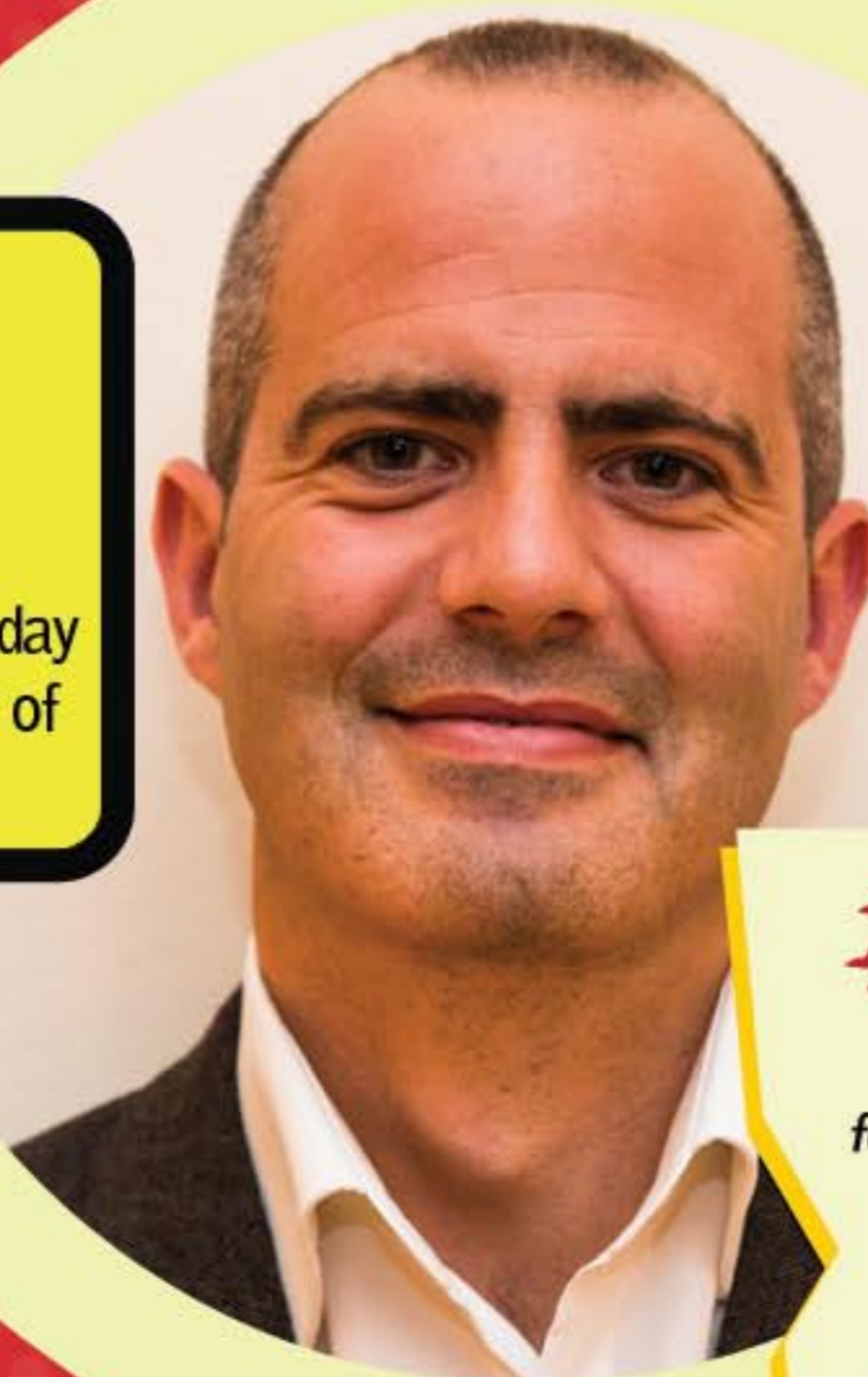
Pfizer Europe

My Pearl of Wisdom...

"Engage all of your senses and emotions, use them constructively to engineer the experience your customer's deserve."

MY CX SUPERHEROES

- Ian Golding
- Shaun Smith
- The people I work with day-to-day who are committed to this way of working



If I had to do it all over again

"I would have introduced a customer feedback mechanism earlier, prepared myself for a longer journey and I secured more senior level engagement."

MY CX CHALLENGE / APPROACH...

Mike works for an organization that is focused on making an impact to peoples' lives with its products. As Mike describes it, "Medicine is an incredible technology which has the potential to improve peoples' lives. The research and commitment of the pharmaceutical industry has been central to helping achieve this." Mike understands that the commercial part of the pharmaceutical industry has been historically successful in engaging healthcare professionals through

communicating the quality of the products it creates. But to keep pace with modern expectations many pharma companies are talking about Patient-Centricity, however few have it embedded within routine behaviors and operations. Even fewer have demonstrated consistent commercial successes as a result. Over the last 2 years Mike has been very fortunate to have a role which has mandated him

to explore the practicalities of making Patient-Centricity an operational reality. through 'hands on' trial and error. As a result, he has developed a successful management framework which integrates the operational capabilities of many different organizational functions to deliver value across the patient journey. Mike reflects that having a management framework that has provided a consistent approach is a key to their success in formalizing

MIKE BELLIS

and recognizing Customer Experience Management in Pfizer; but underpinning this is a growing culture of empathy with the patients which the business serves.

My CX Superpower

Resilience – “Customer Experience Management is a tool to help organizations evolve to prioritize ways in which to create value for customers in a purposeful and profitable way, but it can also often mean a change in the way an organization works. This change often comes with resistance and setbacks’, so having resilience is important.

I find having a strong personal connection with ‘doing the right thing’ for customers is what drives me, and by knowing there will be a longer term pay off through their loyalty and advocacy means I can be confident I’m also doing the right thing for the business. If there is a set back with my plans, it’s this which acts as my personal alarm clock making me ready to go again the next day.”

Mike is driven by the vision of pharma companies creating sustainable growth by helping patients to achieve their health and wellbeing goals, thus expanding on the current proposition of manufacturing and selling medicines.

He believes many people who have chosen to focus on customer experience like him are driven by and committed to a purpose to improve the lives of people – both customers and colleagues – as much as being committed to securing organizational success.

My Biggest Surprise

“Mike is the first pharma executive globally to be awarded CCXP status (Certified Customer Experience Professional); a designation which indicates his capability to transform businesses to improve value for end users, and generate sustainable profit.”

My Top Quote

“CX is so elegantly simple that pretty much anyone can do it after being trained, but it takes resilience and perseverance to realize its full benefits.”



NANCY PORTE

Vice President, Global
Customer Experience
Verint



My Pearl of Wisdom...

"You have to be really comfortable being a disrupter. You are creating change and being a 'constructive disrupter' to help others consider and adopt change that improves the customer experience."

MY CX SUPERHEROES

- Jeanne Bliss – I wouldn't be in this field if it weren't for her first book.
- Ryan Hollenbeck, Senior Vice President, Global Marketing, Verint – Every day he inspires me. He is the executive sponsor of our program at Verint. From day one, he has helped shape our vision for what a CX program should be, asked questions, and studied and read up on the business value of customer experience. He really gets it.



MY CX SUPERPOWER

Silo Crusher – I think my superpower is coming in and breaking down silos through collaboration.

MY CX CHALLENGE/APPROACH...

Nancy Porte has instilled a governance structure at Verint that thrives on executive-level support. After Verint acquired Vovici in 2011, Nancy shared her vision for customer experience with Ryan Hollenbeck, Senior Vice President, Global Marketing at Verint. Hollenbeck immediately saw the value of a formal customer experience program, and alongside Nancy, created the

company's CX Vision: to develop customers for life by helping transform how Verint engages with its customers. A governance structure with three core layers—Strategy, Alignment and Execution—also was developed. The team drove executive support with the strategic layer at the top, involving executives from all areas of the company, including the president. This group met monthly

to do the research needed to understand where changes should be made. They set the strategic vision. But the executive leadership didn't stop there. At the alignment level, those executives carry forward the strategy by leading specific CX steering committees. In the beginning, some immediately got it and began correlating key drivers and



NANCY PORTE



moments of truth with operational measures. Others needed more help connecting the relationship.

Today, the program has broad support across all areas of the company and strong participation from its customers. Verint continues its focus on creating customer champions by understanding their business needs, proactively communicating with them, and making it easy to do business with the company throughout their journeys.

Nancy is also quick to credit this to the level of executive sponsorship and engagement. She has found that the CX vision and structure support continuous exposure and education for new executives as they come on board, as well as across departments, by sharing, collaborating and applying customer feedback and data for positive change that can benefit customers and the business itself.

"Building executive sponsorship is an ongoing activity. At one time, I thought this would be a phase, 'build executive sponsorship,' that I would check off. But this is something that you have to do continuously. There are competing priorities constantly in a fast-moving organization. You need to continue to keep your program a priority."

My Top Quote

"My philosophy is that a CX Team should never be very large. I never want a company to say 'CX -- we have a department for that and it is their job.' CX should be part of everyone's job. You need the organization to take responsibility for the customer experience. When executives are thinking about where to go with it and how to resource projects, it becomes part of the DNA."

On Innovation

"You have to be so innovative because you are creating change -- change calls for innovation, and innovation leads to progress."

If I had to do it all over again

"I'd spend more time on executive education about how customer experience contributes to the success of a growth company, including best practices and industry case studies. We were excited to get started and rolled right into how we were going to improve CX at our organization. Never assume that all stakeholders get the relationship between customer experience, loyalty and revenue."



KAREN MANGIA

Senior Director

Cisco Systems

My Pearl of Wisdom...

"Ask for help from your CX professional peers! Customer Experience is a team sport, so no matter how good your core team is, you always need the rest of the business to participate with you, to support you."

My Top Quote

"When you are in a role like this, having experience in sales and operations is an asset. It makes it easier to represent what customers care about and then enable the business to take action."



MY CX SUPERPOWER

Passion for the Customer – I have walked in the customers' shoes: I was previously in sales, with a very clear understanding of what betterment for customers entailed.

MY CX CHALLENGE / APPROACH...

Karen Mangia understands the importance of seeing the company from the customers' vantage. Her career is filled with roles that have emphasized for Karen the importance of improving the customer's experience. In a business-to-business environment Karen and her team sought to have a clear understanding of the customer's perspective across their customers' companies. They introduced into their CX Strategy a unique way of engaging with the top executives

at their top customers. Building on a program already in place where top Cisco executives were paired with top executives at their customer companies, her team developed standard questions for their executives to facilitate conversations that would generate a better understanding of the executive customer's perception of Cisco. Those conversations were analyzed with both sentiment and text analytics, and the results became part of their long-range planning, messaging to the sales force, and

tools for employee engagement. Through their work, they have found that executives are more inclined to respond with answers that relate to business strategy, a much different response than the feedback received through their customers' frontline employees. Through this approach Karen and her team have a clearer understanding of what their customers need from them concerning how they measure success.



KAREN MANGIA



"I think this has worked well for us because we have a customer-success-oriented company, and this engages multiple people and is a live conversation. That changes the dynamic versus filling something out."

My CX Superheroes

- Bruce Temkin (Temkin Group) – I appreciate his pursuit of starting an organization that gives the CX profession a place for education, networking, growth and community
- Brian Solis – He brings a great point of view, and I appreciate his discussion of how customer experience and user experience interact and drive innovation
- The other CX Professionals that serve on the CX Council for The Conference Board
- Ginna Sauerwein (FedEx) – At FedEx they capture the hearts and minds of employees and have a specific metric that they can affect
- Christi Hill (Eli Lilly) – She works in healthcare, where different rules apply, and has been very pragmatic and strategic highlighting incremental wins

On Thinking about Success

1. Participation – we want the respondent mix to be a representative sample.
2. Change in loyalty – we have a loyalty matrix that we are looking at year over year.
3. Change in sentiment.

My Biggest Surprise

"The biggest surprise has been how much a single quote or story from a customer can capture the hearts and minds of employees."



If I had to do it all over again

"We would have moved more quickly toward having a simple conversational open-ended format instead of trying to use that as a verbal scoring mechanism."



BOOM

MARK SLATIN

Senior Vice President, Director of Client Services

Sandy Spring Bank

My Pearl of Wisdom...

"Recognize that you can't do it on your own. You are going to need leadership commitment, technical expertise, and a tremendous amount of patience and trust in the process."



MY TOP QUOTE

"CX practitioners have to remember how important it is to keep your foot on the gas and know when to back off some, but always keep your foot on the gas."

MY CX SUPERPOWER

The Supersonic Call – He knows this (CX) is a team effort.
"Recognizing that I can't do it all by myself."

MY CX SUPERHEROES

"JEANNE BLISS"

– because we have used her to help us here and in the class I teach at Loyola University, Jeanne's book Chief Customer Officer 2.0 is required reading

"BRUCE TEMKIN "

– because his work influences our profession

"FORRESTER AND GARTNER"

– their research provides great insights

My network of other CX counterparts

CXPA- Everyone who gives of themselves to promote the profession and overall CX movement

MARK SLATIN

MY SUCCESS HIGHLIGHTS

- Monthly CX Strategy team meeting CEO and CIO to talk CX Strategy
- Monthly Executive Team working session
- Organizational adoption with "Meeting in a Box" to build a monthly rhythm, educate on CX principles, build consistency and inspire employees
- Annual Offsite CX Planning Retreat
- The 2015 CX Innovation Award

MY CX CHALLENGE/APPROACH...

"Sandy Spring Bank is over 147 years old with a rich banking history in the communities around Washington DC, Maryland and Virginia. Our culture reflects our pride in, truly knowing our clients because our employees live and work in the community in which they serve."

...our CEO Dan Schrider and his vision and commitment to a client focus and to integrating CX efforts to the bank's long-term strategic initiatives.

"With over 700 employees there is an emotional connection to the whole journey that we are on that connects the head and the heart of our team to our client experience mission."

That connection and sense of unity is built heavily around storytelling. Mark and his team create a lot of internal videos and put out a "CX Minute" every three weeks showcasing stories of success and leadership commitment.

Today Mark credits their three pillars of success: leadership commitment, momentum and communication. Over those pillars and connecting them together are competencies that Mark's team works hard to embed into the culture.

If I had to do it all over again

"I would get this eBook and read it front to back! This is about transforming a culture to deliver remarkable experience for our clients. You need to focus on the organizational piece of it. It is really about engaging the employees."

MIKE WITTENSTEIN

Founder and Lead Experience Designer

Storyminers



My Pearl of Wisdom...

"Design each experience twice. Once for customers- and once for the employees who will deliver it!"

MY CX SUPERPOWER

HUMAN-CENTERED EXPERIENCE DESIGN

I'm super creative about introducing just the right details in an experience... the ones customers will discover, remember and share.

MY CX SUPERHEROES



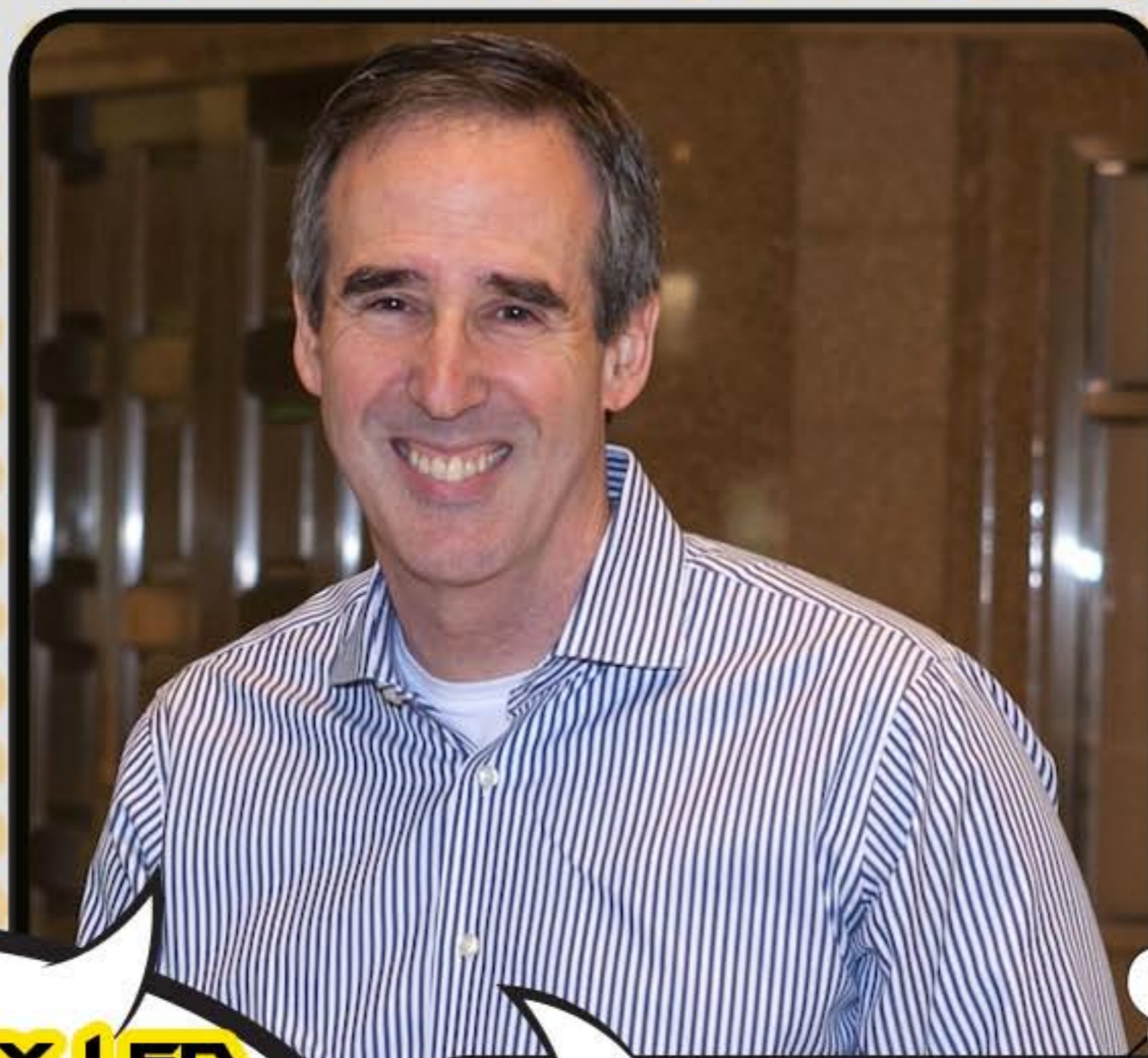
"PEOPLE"

Lou Carbone and Steve Haeckel, my first CX mentors.



"COMPANIES"

Disney, Apple, and PIRCH because they practice CX on purpose and by design



BEING CREATIVELY LED

"At Storyminers, it's just more fun to tackle a client's project from the creative side first. Clients with game-changing agendas love 'stepping into their future story' and seeing/feeling first-hand what the experience will look like and feel like."

MY BIGGEST SURPRISE

"MY CLIENT WASN'T AFRAID OF FAILING. HE WAS AFRAID OF AIMING TOO LOW."

Mike was concerned that one of his clients might get overwhelmed with some of the ideas the Storyminers team came up with for their new retail concept. He was pleasantly surprised when the client told the team to "not hold back one bit". This client knew that to get breakthrough results, he'd have to break the mold. That was heartening for Mike and for the whole team.

MIKE WITTENSTEIN

MY EX CHALLENGE/APPROACH..

On Focus

Mike Wittenstein believes it's important for an experience designer to develop a sense of caring about others. To do that, you have to invest the time to learn about them. Eventually, you will be able to see what they see the way they see it. At that point you will have the ability to recognize the customer experience clues that matter to that individual. Intuitively, you'll know which details need to go in—or come out of experiences you provide for them. It's a valuable skill for a customer experience designer—and it all starts with persistent curiosity about your fellow human beings.

On Design + Discovery

Good experience design starts with caring for the needs of others. Great experience design incorporates appeal to their emotional core. One of the best ways to embed emotional resonance into an experience is to focus on the concept of discovery. Mike believes—and practices—that both clients and customers prefer to discover things for themselves rather than 'being told' by others. That's where Storyminers got its name. The highlights one person discovers in an experience they enjoy become the details of the story they share with others. The next person 'discovers' the experience (through the story they just heard) then desires it for themselves.

On Intelligence

The best experiences don't just happen. They happen on purpose and by design. Mike has admiration for companies that do that, like Disney, Apple, PIRCH (and many other less-known brands). He notes that many of them have a common theme of making their experiences 'intelligent', which means that they are purpose-built to be better, cost less, require less effort, and do more. Simply, intelligent experience design is a practical way to give everyone more of what they want. Currently, Mike is codifying four design principles that will allow everyone to unlock the potential of intelligent experience design: touch, proximity, anticipation, and agility.

MIKE'S EXPERIENCE DESIGNER'S CHEAT SHEET

- Be perennially curious.
- Care about others.
- Work on purpose and by design.
- Sweat the details to achieve emotional resonance.
- Never steal a discovery experience.
- Use design to give everyone more of what they want.

ANNETTE FRANZ

Director, Customer Outcomes

Fidelity Investments

My Pearl of Wisdom...

"You really, truly cannot accomplish anything without executive buy-in and commitment. Your CEO, once committed, will be much more willing to align the right resources (human, capital, or other) to get the job done."

MY CX SUPERPOWER

"Teaching and inspiring—from over 20 years of learning"



If I had to do it all over again

"I would do exactly the same thing. I find that being bold and going right to the source is often the right move."

MY CX CHALLENGE / APPROACH...

Annette has worked with and coached countless organizations throughout her varied career with regard to CX, and one such organization was a retail client that had well over a hundred locations. They were heavily focused on customer acquisition versus retention. CX was not a priority focus. Traction and adoption throughout the organization just wasn't there, and it seemed as if there was a lack of understanding as to why it was important at all to focus on customer retention.

They were very metrics-driven; they focused on NPS, and that was about the extent of it.

"As we all know, executive commitment is critical to CX, and it seemed as if they were just checking the CX box. So I made a bold move and just called the CEO. We had an engaging conversation about the investment they were making in CX, the ROI, and why it was important to focus on customer retention. He really took the time to listen to me, understood the critical factors I was describing, and began to see

how they could better leverage their investment."

The timing of this conversation could not have been better, as it happened a few months before their annual company strategy meeting, which is where the results of Annette's intervention began taking shape.

"In his opening address, the CEO began to share a lot of what we had discussed, reiterating the importance of CX to the organization and why a shift toward focusing on customer



ANNETTE FRANZ

MY CX SUPERHEROES

“The folks that ‘get it.’ Those people for whom you don’t have to explain why it’s important to focus on the employee experience and the customer experience. One that I’d call out, who’s not one of the ‘usual suspects,’ is Bob Chapman, the CEO of Barry-Wehmiller; his philosophy is one of: everybody matters: people matter, employees matter, culture matters - then and only then can you deliver a great customer experience.”

retention was so important to their business. I also had a role at that meeting as an invited speaker and reinforced much of what the CEO had said. With other key internal stakeholders 110% on board and carrying the message forward, a new focus on CX began to permeate the organization; that was the catalyst for change.”

The third-party perspective that Annette was able to offer in this case is an example of why it’s important to have broader inputs around the benefits of CX. Some organizations can get stuck in a routine and simply focus on a single metric like NPS and miss other critical elements and benefits.

The Highlights of my Approach

- The CEO listened and acknowledged that his commitment was the defining factor
- He re-committed to the program and to the effort
- We started to see retail locations adopt the practices

Measuring and tracking success

- NPS: it was steady and declining before the intervention but turned to a positive direction after about a year
- The shift from a customer attrition focus to a customer retention focus
- The culture shift and organizational transformation through education

My Make-or-Break Moment

“It was that moment when I wasn’t sure if he was going to take my call or not—and he did that and then some! Without his blessing and engagement, I knew there would be no forward movement, no transformation.”

Sustaining the Momentum

“Once the CEO established the direction, I then worked with the key executives that comprised the core CX governance team. They established a huge communication and educational effort across the entire organization, including all of the retail outlets. This transformation started five years ago and has now led to CX becoming part of their leadership compensation plan. That’s how much they matured over that time.”

TERRY CALLANAN

Chief Quality Officer

Carestream Health

My Pearl of Wisdom...

"Expect some challenges along the way but overcome them. Be relentless. There will be lots of reasons why 'this won't work' and people will tell you why. Start small, be roughly right, learn from it, refine it and then expand it."

MAKE-OR-BREAK MOMENT

Our make or break moment is the one we're in right now. Even though our NPS is high, we are in a new dynamic as we are reaching a plateau. There is a risk that focus on improving the metric will detract from the real objective of improving the customer experience. Accordingly we are looking at alternative measures of success. For example, we are considering moving toward more behavioral metrics for motivating CX improvements such whether employees are engaged in projects to improve CX, or to what extent employees understand what dissatisfies our customers, or operational metrics such as service response time and resolution time."



MY CX SUPERPOWER

PASSION

"MY ABILITY TO INSPIRE AND EXCITE OTHERS ABOUT CUSTOMER EXPERIENCE."

MY CX SUPERHERO

KEVIN HOBERT, CEO OF CARESTREAM

"It was his vision that we be known in the industry for meaningful innovation and outstanding customer experience. He shifted our company focus from internal to external. His vision and support brought customer experience to life at Carestream and it's why it is part of our culture."

TERRY CALLANAN

MY CX CHALLENGE/APPROACH...

Carestream Health became an independent company in 2007. "We were running surveys through third party consultants that resulted in 80-slide presentations that (1) were out of date the day after they were prepared, (2) provided results that were not actionable, and (3) led managers to ask questions that were not answered within the slides. We clearly needed something more dynamic and more in line with the new vision of customer-focused culture we wanted to create."

Terry was tasked by his CEO to design, create and bring to life a new CX process for Carestream and he approached this using 10 distinct steps:

1. Align executive management with new CX goals and vision

2. Create a cross-functional core CX team to embrace the new vision and become agents of change
3. Brand CX within Carestream as something special and easy to communicate—named eXceed
4. Conduct pilots with selected customers to test the process for measuring, collecting and analyzing CX data before expanding globally
5. Identify key performance metric correlated with business growth—an NPS derivative based on a five-point scale
6. Provide complete survey access to all employees for full transparency
7. Provide analytic tools so employees could mine specific actionable and timely data pertinent to their part of the business

8. Create The eXceed Commitment—articulating the intended behaviors toward new prospects and current customers
9. Review actions, learnings and impact of prior actions
 - a. Weekly meetings with the CEO for the first two years
 - b. Quarterly meetings with CEO and senior execs ongoing
10. Drive improvements using the Deming PDCA closed-loop problem-solving process

These steps took place over the course of seven years and serve as a prime example that cultural transformation is not a short-term strategy.

It takes focus, management commitment and constant follow-through, as Terry has shared.

If I had to do it all over again

"I would have taken a more balanced approach to measuring and improving CX at our four key touch-points (sales, installation, service and product). eXceed has become perceived by some as focused only on the 'service customer experience' when in fact it's about the total customer experience."

THE HIGHLIGHTS OF MY SUCCESS IN THIS APPROACH

- Continual year-on-year improvements in NPS
 - Peer to peer recommendations are critical to growth in our business
- Changes in organizational structure to provide a better customer experience
 - Centralized our service organization across product lines
 - Adopted common metrics and processes to drive improvements in key CX drivers
- Validation of CX—specific customer feedback indicates positive change at Carestream
- Customer Champions—a web-based employee recognition-by-customers program (receiving 150 nominations/month)



MICHELLE MORRIS FREET

Associate Director of Client Experience
Crowe Horwath, LLP

My Pearl of Wisdom...

"You have to have engagement support, conviction and tone-setting from the top. That is critical but, once that is done, people across the organization can have even greater influence than that top tone-setting. You have to tap into that."



MY CX SUPERPOWER

Amplifier – the capability to observe and boost the superpowers of each individual in the organization



MY CX CHALLENGE/ APPROACH...

Michelle Morris Freet is a problem-solver by nature. When she joined the team at Crowe Horwath they already had a steering committee up and running, but were hungry to engage the rest of the company.

Michelle understood that communication was key, but that brought additional challenges to an organization that has employees spread across the country, constantly traveling, usually with clients, and working remotely. Her team used a monthly video broadcast by the CEO in addition to aligning with the communications team to publicly recognize and reward employees who demonstrated behaviors in alignment with the CX strategy.

The number of CX ambassadors at Crowe Horwath has grown from around 25 in Michelle's first year to approximately 190 now, two years later. The growth is remarkable, but the strategy behind it is even more so. Michelle's team has methodically sought employees who are specifically recognized by clients for their approach. She learned early on that her team wasn't the right group to manage these ambassadors. The team turned to the already established steering committee and recommended that the steering committee members from each business work with these ambassadors to affect culture.



MY EX SUPERHEROES

- Bruce Temkin, Megan Burns and others in the profession who have been doing this for 20 to 30 years, even before it was called customer experience.
- The people in the business whom I get the opportunity to hear about, and what they are doing for our clients. "You really worked all weekend to make sure the client got what they needed. You send them flowers!"

MICHELLE MORRIS FREET

If I had to do it all over again

"I would've engaged our internal (not client-facing) employees as ambassadors immediately and included them as part of the experience."

ON MEASURING SUCCESS

- With each program we measure our overall engagement scores and then a level deeper into participation and communication.
- Employee Engagement: on CX Day we had an expert come in and present a panel. We had over 500 people listen in.
- We also track Forrester's maturity index.

MY TOP QUOTE

"Find like-minded people and use their passion to move forward."

Michelle credits their success to ensuring that the model fit their company and culture. She describes the importance of making sure everybody in the company is engaged. She shares that her biggest surprise has been how passionate employees can be when empowered.

"When you let people use their skills and things they are passionate about, it just kind of grows crazy a bit, and I love that it brings in all new perspectives. I'm inspired by our people."

LISA CRYMES

CCXP Chief Experience Officer
DST Health Solutions

My Pearl of Wisdom...

"Providing great customer experience is founded on an effective customer experience program...an effective customer experience program is built best by thoughtfully designing to the traits and needs of an organization's customers instead of adopting tools designed for other customer communities."

MY CX SUPERHEROES

Ingrid Lindberg. I really appreciate her energy and philosophy on things. She offered encouragement anytime.

Jim Tincher. He just gets it and is a fun guy to talk to. He understands how to listen.



MY CX SUPERPOWER

Listening – part of our framework. It all starts with listening.

MY CX CHALLENGE / APPROACH...

Lisa Crymes didn't want her Customer Experience efforts to be looked at as merely "fluff." She knew surveys wouldn't work because there was a tendency to do nothing with the data that would create more issues. What she wanted was a qualitative approach that would use ethnography to dive deeper into their perceptions of DST Health Solutions and their experiences as customers. Her break came when the

technology group shared that they had several projects needing user interface work. Lisa and her team knew that was the perfect opportunity to go end-to-end on something that was both B2B and B2C. She sat in on member calls as well as going onsite and interviewing managers, trainers and stakeholders. Her team collected stories and built credibility internally and with customers.

She has now been able to find themes across key moments of truth and can point out issues as they appear on the overall customer journey. Lisa is now taking that invaluable qualitative data and looking for ways to translate it into quantitative measurements. She says that it is hard work changing the way people think, but she has been pleasantly surprised by how much fun it has been.

LISA CRYMES



HIGHLIGHTS

- Early realizations that surveys weren't right for them
- Listening to customers and having stories to share gained credibility for the effort
- Approach qualitative measurements scientifically
- There is power in listening



ON LISTENING AND VALIDATING CUSTOMERS

"About a year ago, my position had just been announced and I was given a speaking slot in front of 60 customers. I did an exercise asking everyone to stand up and go to different sides of the room if they agreed or disagreed. There were good and bad things. Things we'd never heard. I didn't allow our team to respond. It was about listening. The energy at that event this year was so different. Customers feel heard and validated."



RON TAYLOR

Vice President, Customer Support
Sage

My Pearl of Wisdom...

"Understand that no one source of data will provide the answer."

My Make-or-Break Moment

"Our willingness to embrace a cultural shift away from a 'new features' development focus toward a 'make it easier to use' focus."



MY CX SUPERPOWER

Navigating the Organizational Structure – Tapping into the organization's ability to capture VOC from multiple sources and pulling it all together

MY CX CHALLENGE / APPROACH...

MY CX SUPERHEROES

- First and foremost, our front-line employees– by virtue of our open environment
- Colleagues within our functional groups who positively affect the customer every day (product management, product marketing, sales)

At Sage, Ron's approach is to fully engage all internal groups within the organization in understanding and improving the customer experience.

"We use an MRI approach, versus the X-Ray, and we approach CX from many different angles. We have a very robust customer online community that we call Sage City."

Ron developed a three-pronged approach that involved:

1. Establishing easy access to transactional feedback for all functional groups and front-line employees – most importantly, the narrative comments.

2. Creating a higher sense of accountability and ownership among all internal teams for addressing and resolving customer issues as quickly as possible.

3. Focusing heavily on specific questions that get to the heart (emotions) of all interactions the customer has with the company, especially the frontline, where interactions are the most frequent. Teams tend to be more fully engaged with acting on customer feedback feedback when the questions deal with specifics and not just overall customer satisfaction. Ron has also been able to correlate the results



of the daily transactional responses from their customers with the quarterly loyalty surveys.

Another part of Ron's approach is to identify the five to eight key pain points, mainly around the user experience with products, but also around Sage policies and practices, and then establish realistic improvement goals. "We run these pain points through a tool I developed called 'The Grinder'." The output of **The Grinder** is a weighted score for each pain point. This helps the company more easily decide what issues it should be working on and also uses predictive modeling of how that improvement will move the primary customer metric (NPS) forward.

The Highlights of My Approach

- Taking a holistic approach and engaging teams through real-time customer feedback, along with accountability for their actions
- Correlating transactional and loyalty customer feedback and tying that to predictive modeling to drive improvement
- Communicating our successes and improvements in realtime back to the customer in order to demonstrate results and move the NPS needle significantly higher.

My Top Quote

"Scores can be an indicator but they're all relative. What's really valuable is when customers can explain why they gave the scores they did."

Measuring and Tracking Success

- Rise in NPS
- Ease of customers accessing and reaching us
- Customer renewal rates (Sage is a subscription business)
- Consumption of additional products and services (deriving more value)
- First Contact Resolution rate from the customer's perspective (unlike many organizations)

My Biggest Surprise

"The immediacy of the engagement level of colleagues within the broad spectrum of functions and especially those in sales, as it involved transparency and therefore some risk."

If I had to do it all over again

"I would have gotten started a lot sooner."



KARL SHARICZ

Founder & Principal

CX Partners, LLC

My Pearl of Wisdom...

"Don't think too long or hard before you start something or take action. Start small, keep learning and building. There will be roadblocks and failures for sure. If you are not failing, you aren't learning."

MY CX SUPERHERO

Sir Richard Branson. He combines art and business in such an incredible way.



MY CX SUPERPOWER

The Art of Listening

MY CX CHALLENGE / APPROACH...

Karl Sharicz began his career in the lab sciences and journeyed through sales, business development, and training and development roles, but it was his integrity and innovation that led him into Customer Experience at Tyco Simplex Grinnell. He recognized that the company's Voice of the Customer program was broken and employees had begun gaming the system. He proposed a solution and was placed into a role that would oversee executing that solution.

Those early days were challenging for Karl as he and a small team of three people with no budget had to expose the broken system and gain buy-in for the solution. He began with front line employees who were directly invested in the VoC program and who were rewarded through the system. It was critical early on that his team listened to those employees first and then started implementing changes. That incremental success brought with it the necessary funding and Karl's team brought in a third

party to help gather the data impartially and they created a metric they called Net Customer Advocacy (NCA). This branded version of NPS became the key customer metric and provided a promotional vehicle that spread across the organization. When the CEO and the senior leaders began using the term regularly in meetings, they knew they had buy-in they needed across the organization.



KARL SHARICZ

But Karl understood that simply and accurately listening to customer feedback wouldn't be enough. They developed a closed-loop response system to act on the feedback. Today Karl serves as an independent consultant with the knowledge of what resonates within organizations and how to build a sustainable VoC system. He remains surprised that he was able to enter an entirely new career field and build a sustainable customer-centric process that the entire company rallied around.

ON RISK AND FEAR

"I'd have taken the risk a lot sooner. We all get that fear of what if I do take on the challenge. Those hesitations can keep you entrenched in the status quo."

On Facilitating Change

- The customer will never go out of fashion. Once you see the outcomes of CX change those won't be given up easily
- Have something to show that you are making progress
- Always look for small wins and promote them
- You need to get to a place where it becomes part of your DNA and you are doing it but not thinking about it—becoming an unconscious competent



KRISTIN GUTHRIE

Vice President, Customer Experience

Honeywell Aerospace

My Pearl of Wisdom...

"The Customer Experience is like a Lite Bright set. Every small project is a peg and each one you add makes the picture clearer, both internally and for customers."



MY CX SUPERPOWER

X-Ray Vision for two reasons:

1. The ability to look through data and understand what the customer is telling us and what matters most.
2. To look at the changes we make as an organization and see the resulting customer impact.

If I had to do it all over again

"I would find and train the organizational champions earlier. I would have convinced them first of the value and then deployed them as champions throughout the organization, before launching initiatives."

MY CX CHALLENGE / APPROACH...

For Kristin Guthrie, Customer Experience has to have a proven backbone and structure. Working with 40,000 people at Honeywell, primarily engineers, she cannot allow her approach to "feel too warm and fuzzy."

Kristin has brought a clarity and approach to the customer experience efforts in her company by establishing five pillars around which they track initiatives and have identified measurements in place.

Recently her team measured customer support offerings. They identified a particular issue that customers had with an overwhelming number of aircraft bulletins and the inefficient and painful process of sifting through them. Facing internal skeptics, Kristin and her team drove the company toward an innovative new solution to this issue that has far surpassed expectations, with respect to how well it has been received.

KRISTIN GUTHRIE

The success her team has had driving change has now built trust among both employees and customers. Kristin has been surprised by the unsolicited feedback they now receive from employees and the emotional response they've witnessed from their engagement techniques.

Kristin's team continues to build employee engagement and measure and track initiatives along their five pillars. They share testimonials widely and relate CX efforts back to revenue generation.

THE FIVE CX PILLARS AT HONEYWELL

1. **Crisis Management** – What is the event telling us and how do we develop initiatives and process changes that avoid creating crisis?
2. **Customer Advocacy** – What are those things that no one asked for and yet can make it better to do business with us?
3. **Employee Engagement** – How do we engage and rally around CX? What is their place in the pinwheel and have we given them the tools?
4. **Cross-Organizational** – What are those things that we are doing that might not be considered CX, but affect it?
5. **Revenue Generation** – We realize that we have to tie our efforts to money. Part of it is measurement and how are we affecting sales.

MY TOP QUOTE

"We read that images garner more attention, so we started adding images to internal communication. On one email that went out, one of my team members included a photo of a kitten with paws in prayer and asked that veteran employees complete a survey. We had the most amazing response with employees telling us it was the best email they'd seen in 20 years."

BRIAN GNATT

Assistant Vice President, Customer Experience
University of Maryland University College



My Pearl of Wisdom...

"Open channels to listen to your customers and don't neglect to follow through on their suggestions"

MY CX SUPERPOWER

"CX-Ray" Vision – observing pain points and opportunities for improvement

If I had to do it all over again

"I would pilot and test more solutions."



MY CX SUPERHEROES

The frontline staff people who actually get CX and will do anything to resolve an issue for customers. They are making a difference.

MY CX CHALLENGE / APPROACH...

For some people working in government or large organizations, it can be difficult to jumpstart a new initiative or idea. Brian Gnatt believes you must be nimble and quick, never letting bureaucracy or fear of change prevent trying new things. His team was in desperate need of customer feedback for its technical support center, so he put that belief to the test.

"We had limited resources but were really determined to make a difference and improve the customer experience.

We wanted to start immediately and we needed a solution to get us started."

They picked an inexpensive off-the-shelf survey tool and immediately began collecting customer feedback. With quick success after the initial implementation, they continued to pilot other ideas that were quick and provided results. The feedback they were receiving from customers was immediately used to identify opportunities for improvement and drive additional

enhancements.

Brian has been able to demonstrate the value of administering surveys, which enabled his team to mature its processes and justify growth and more expensive tools.





BRIAN GNATT

“You don’t have to spend \$100,000 to learn what your customers think about your company. You can do something much less expensive and get the same customer feedback. What we’ve found is that you can often demonstrate value and then invest the money to make those improvements, and that really helped us earn executive buy-in.”

My Tips for Quick Change

- New ideas can be piloted with relatively little time or money; this makes it much easier to kill an initiative that isn’t delivering the expected results. If you are committing, keep a long-term perspective and be sure you can support it 100%.
- You can’t stop at listening to customers. You must follow through and act on their recommendations.

My Professional Tip

“Data speaks and people listen. It can be difficult to garner support for initiatives without data, but with it, you have a powerful tool to unite people. ”



ZHEVANDA "Z" CLARK

Business Operations Analyst
Navy Federal Credit Union

My Pearl of Wisdom...

"Choose team members who are passionate, analytical thinkers who want to free the data but who can also communicate well and help people make emotional connections to the members who exist within the data."



MY CX SUPERPOWER

Helping people clarify their data requirements from what they want to what they need.

My Top Quote

"Using data to tell a story creates an emotional connection which can translate to a partnership in which people will take on stewardship of the members who exist within the data."

MY CX CHALLENGE / APPROACH...

In her current role, Z gathers and analyzes direct member feedback from multiple contact points and channels those discoveries in order to close the gap between members' expectations and the company's performance.

"I make recommendations based on the findings from the data analysis in order to effectively advocate for changes that will improve the member experience. But presenting data isn't always enough to get traction. I have found that in order to get people to engage with the data and the

subsequent recommendations, you have to make it personal by using the data to tell a story about the member."

She provides verbatim examples from the members' phone calls, chats, emails and social media posts of what they say and how they feel about their experience with Navy Federal Credit Union. "It is my goal to build a relationship with the people who are using the data, and in order to engage them I have to help them build a relationship with the

members who exist within the data."

Why This Continues to Work...

"Getting people to engage with data helps to develop trust between the data analyst and the people who need to use the data and it helps to create emotional connections to the members who exist within the data. This trust and connection result in advocacy that benefits the member and the organization."




**ZHEVANDA
"Z" CLARK**




On Measuring Success

"I measure success based on the relationships I build during data analysis. I know that I have engaged someone with data when they come back to me later and say things like: 'I'm not even sure if this can be done, but...' or 'I figured if anyone would know how to do this, it would be you.' Those are signs that they are starting to think about what data can do instead of just how to solve a specific question and that they trust you to guide them."



My CX Superheroes

Simon Sinek – "I'm a big fan of Simon Sinek and his philosophy that everything we say and do is a representation of who we are, both as individuals and organizations. I agree with his premise that 'If you don't understand people, you don't understand business.' Those of us in the CX world can certainly appreciate his call to behave authentically in order to attract others to us and engage their loyalty."



My Biggest Surprise

"I have been surprised to learn that in addition to providing data, I frequently need to educate people on what data analysis can and cannot do. I ask a lot of questions before I begin working on data projects and listen to how a data request originated in order to determine the best approach. I have learned that walking people through my approach and what I expect it to deliver allows me to dispel assumptions, gain clarity, and build trust."



BOOM

POOF



SONYA MCALLISTER

Principal/Senior Vice President

Walker Information

My Pearl of Wisdom...

"Perfection is not really required, so don't get too hung up. Just keep going. Do something and then keep getting better."

MY CX SUPERHEROES

The people doing the day-to-day work, who are sometimes rewarded and sometimes not, but continue to grit it out.



MY CX SUPERPOWER

The Power of Persuasion

MY CX CHALLENGE / APPROACH...

The very nature of Sonya McAllister's role exposes her to customer experience adoption across various organizations and cultures. She has become adept at evaluating a situation and working with it rather than against it.

She compares two of her recent experiences. The first was with a company going through a culture change that saw the firm shift from a product focus to become a more customer-focused organization. The second company had a more

top-down directive that was based on some competitive pressure that it felt in the marketplace.

For the first scenario, Sonya worked with the company on an inclusive process to get many employees involved in the process and solution. They had a pilot, took it slowly and ensured that everyone felt comfortable.

In the second case, Sonya and the company jumped right in to solve an urgent business problem that needed to be addressed. In both instances they prioritized actions for the business and addressed the

challenges each faced. It was important to work within the situations and go with the grain, studying the culture and business challenges, then staying within the comfort zone.

Both companies have a working CX Team in place, and people are excited about the real change they are seeing occur. Sonya shared that there is an excitement in years one and two of a new initiative that encourages commitment.

SONYA MCALLISTER

When asked how to maintain that momentum down the road in years three, four and beyond, she said, "The effort needs to get more and more targeted and not be everything to all people. It needs to really focus in on key areas and what supports the business challenge, which can evolve, too. Keeping it fresh is key, and it is on us to continue to provide new insights that go even deeper into what is driving a particular issue in order to do that."

On Thinking about Success

"We are seeking a degree of culture change and how that is demonstrated. It is not always an easy metric to capture, but it is a key value-added thing that comes from CX efforts."

If I had to do it all over again

"I would have started with more of a three-to-five-year roadmap and got commitment for that up front, so that there is a line of sight as to what will happen right away as well as the longer-term next steps."

My Top Quote

"Following the approaches we did, we ended up in the same place with a lot of C-level and Board-level attention in each organization. These things were catching on and being accepted by the Board."



IAN GOLDING

Managing Consultant

Customer Experience Consultancy, Ltd.

My Pearl of Wisdom...

"The ups and downs of what we do are normal, but that is what makes our profession so important. It is too easy to self-doubt, but look in the mirror and ask if you are doing the right thing for the right reason. If the answer is no, pick up the phone and talk to a fellow CX professional. I can guarantee that what you are going through someone else has as well. We need to stick closely together."

MY CX SUPERPOWER

Empathy, Credibility, Authenticity with a bit of Madness – I have been an employee for most of my life and understand how it feels from the inside. I strongly believe that in order to influence an organization to want to be customer-centric, you need authority, credibility and most importantly, authenticity.

MY SUPERHEROES

Jeff Bezos of Amazon – He stands up to shareholders and continuously puts the customer first. Amazon is still the pioneer at putting the customer first.



MY CX CHALLENGE / APPROACH...

Ian Golding finds himself increasingly being asked by organizations, "What's wrong? Why aren't we as customer-centric as we need people to be across the organization?"

At one point in his career, the organization he was with had a clear growth strategy and an aggressive investment plan, but was concerned that growth would be limited by the inability to be truly customer-focused. Ian spent six weeks shadowing employees and observing from the eyes of the customers.

He visited 40 locations, and at the end of that period he had a very detailed analysis for the Board of Directors.

As Ian tells the story, "I was given an hour with the Board and ended presenting to them for over three hours." He presented the five mistakes he saw the company making and they agreed with everything he presented. He was surprised and encouraged that they would consume and accept this critical feedback. It was at that point he made what he looks back on as a significant error.

"I got overexcited and steamed in with a big long list of things that they needed to do to fix these problems. I went in too quickly and hit them hard. It went from complete acknowledgement to partial denial and then finally to not really a problem. I went three steps forward and then four steps back." Today Ian follows his **Customer Experience Readiness Index**, where he asks how ready an organization is for change and lists the company in one of four phases: Acknowledgement, Diagnose, Action and Improve.



IAN GOLDING

He sees people getting stuck in the diagnose phase. A company may recognize the problems it has but lack the resources, courage and/or knowledge that prevent sit from fixing the issues. Ian advocates for turning what you already know into demonstrable changes. He looks back on his presentation to the Board and will never again tell a business everything they need to do in one go. He now delivers the message of change in bite-sized bits and is realistic about how long it will take to transform a business.

"I think it takes five to seven years to truly embed a customer-centric approach. It is about structured evolution."

Customer Experience Readiness Index

- Acknowledge – Sometimes leaders don't want to admit they have a problem
- Diagnose – Let's find out what the problems are
- Action – Go at the pace of the organization and choose the right tactical action to continue to move the organization in the right direction
- Improve – Embedded approach where you have a process in place

My Recommended Reading

Curtis Bingham, Head, Chief Customer Officer Council: The Bingham CCO Authority Model
http://www.ciosummits.com/The_Bingham_CCO_Authority_Model_CDM.pdf

My Top Quote

"I talk about CX as being a roller coaster, and there is no doubt we've chosen to do something that is incredibly difficult. No matter how soft and fluffy people think we are, we are trying to get an organization to change its culture and approach."



LYNN HUNSAKER

Customer Experience ROI Strategist
ClearAction

My Pearl of Wisdom...

"Think BIG. People don't go big enough in their customer experience actioning. Be a bit audacious. Everyone should act on voice-of-the-customer and be engaged. People want to start a pilot and start small, but go big."

My Top Quote

"Our end goal was making it a no-brainer to do business with us. We wanted to maximize customers' capabilities and minimize their costs."



MY CX SUPERPOWER

My Golden Lasso – pulling people together for cross-functional collaboration.

MY CX CHALLENGE / APPROACH...

Before Lynn Hunsaker started work at her previous employer, the largest customer's CEO stood up at a celebratory meeting and declared that his company had to buy from them because of first-to-market technology advantages, but that they were eager for other suppliers to be first-to-market, as they found this supplier to be arrogant and hard to work with. Faced with the risk of losing a significant percentage of revenue, the executives set out to transform customer experience by engaging every line of business, account team,

and support function in customer-focused thinking and improvement plans. Lynn's role was to conduct voice-of-the-customer action planning workshops with dozens of cross-functional groups. For top issues, customer comments were studied in-depth during the workshops, identifying key themes and asking "why" five times to zero-in on root causes. If root causes were identified properly, progress in addressing those causes would predict progress in customer perceptions, survey scores, and business growth.

Every group created a detailed action plan, which had to be signed by its general manager. Action plan progress metrics were the focus, as leading indicators of the next survey scores. All the groups' customer experience action plans were packaged in a "green book" for executives' review at the same time they studied the financials "black book" in preparation for quarterly analyst calls. Every year-end, each general manager met with Lynn and her vice president to discuss customer experience improvement action plan progress, to determine bonus pay.



**LYNN
HUNSAKER**

Creating a Stupid List

“Think about not only the revenue uptick, but also how much it costs to waste precious resources for both your company and your customers because of stupid stuff. Engage employees to make a “stupid list.” It is wise to work on that stuff before you ask customers what you need to work on. Minimizing waste, especially as it applies to consequences for customers, can be as powerful as revenue uptick.”

On Engaging Employees

- One of the most powerful ways of making culture change was through employee recognition. Acknowledging the importance of cross-functional collaboration, customer experience awards were given to teams rather than individuals. Criteria published at the beginning of each year guided teams in self-reporting their progress, with constructive advice from a panel of executive judges. Recognition categories were aimed at resolving or preventing customer issues, or improving internal handoffs that would ultimately be advantageous to customers.
- Lynn worked with the various support functions to revise their processes to include customer experience criteria – in performance reviews, recognition and compensation, internal communications, and so forth.

My CX Superheroes

- Jeanne Bliss – She tells it from the trenches, lays out common pitfalls, and helps you think systematically to get it right.
- Fred Reichheld, Jill Griffin, and Michael Lowenstein – In the 1990s I read everything they wrote.
- Timothy Keiningham – My MBA classmate; he opened my eyes to myths in common thinking about customer loyalty.
- Anthony Ulwick – His refuting of common practices around The House of Quality in preference to “customers’ jobs-to-be-done” revolutionized my CX views, especially about personas, segmentation, VoC, and differentiation.
- Leigh Durst – Her 2006 definition of customer experience management, including customer-focus in core operational capability and accountability, resonated with the way I’d led CX transformation in my job roles.

My Biggest Surprise

“The strongest culture change comes from internal messaging continuity at a steady pace that is consistently focused on the customers’ well-being. It takes a long time to change the culture. You have to have all the irons in the fire. I’d sit with people in HR and in marketing and help mold their thinking to incorporate customer experience.”

ERIN WALLACE

Global Manager, Customer Experience
John Deere

My Pearl of Wisdom...

"Use what your organization already knows about customers to create a quick hit action plan. Demonstrate the ability to drive meaningful action that delivers business results. Measure the impact and use the value story to inform a strategic plan and drive customer-centric culture building activities"

My Top Quote

"It works because leadership bought in, established a leader and the environment for success; giving latitude to try new things."

If I had to do it all over again

"I'd focus more on taking action and then measuring the impact, versus focusing on research and learning as much as we did in the start."

MY CX SUPERHEROES

- Parrish Arturi (Fidelity)
- Blair Skramstad (John Deere Financial)
- Bruce Temkin (Temkin Group)
- Lynn Hunsaker (ClearAction)

MY CX SUPERPOWER

Super Glue: inspiring and bringing people together

MY CX CHALLENGE / APPROACH...

When John Deere Financial began their customer focused journey, leadership realized that the organization wasn't ready for much of the change necessary for success and so Erin & her customer experience team focused their efforts on embedding a culture of customer focus. They developed a vision, a plan and supporting programs, working through targeted activities that over time resulted in real change in terms of how employees thought, spoke, and worked. As customer focus efforts expanded across the company, Erin credits leadership at John Deere

and their focus on demonstrating the right leadership behaviors, as well as employees who keep the best outcome for our company, channel partners and customers top of mind, for the success her company has had. For long term impact, she advocates taking proven steps towards embedding customer focus into the organizational culture rather than metric-driven change. John Deere, throughout its history, has built a reputation of taking care of customers in good and bad times. Erin credits the commitment of resources and continued focus to build upon this reputation,

leveraging learning, human-centered design, and VoC to ensure that customer experiences are integrated and consistent across a distinctive John Deere experience.

Changing Employee Thinking Through...

- Defining the customer
- Communicating customer needs
- Creating a call to action by explaining how the customers are changing
- Improving the hiring and onboarding practices
- Creating and integrating Customer Experience Champion and Executive Sponsor programs

JASON KAPEL

CCXP, Customer Strategy Program Manager

Prudential Individual Life Insurance

My Pearl of Wisdom...

"There are a lot more passionate employees out there than you think, you just need to find a way to engage them."



MY CX SUPERHERO

"The passionate CX Professionals whom I work with on the Twin Cities CXPA Local Networking Event Planning Team. And my first CX boss, David Shapiro (UnitedHealthcare). He is the reason I'm here."

MY CX SUPERPOWER STORYTELLING

"Telling the right message in the right way using the right channel."

My Professional Tip

"A little creativity can go a long way."



MY CX CHALLENGE / APPROACH

At Prudential, Jason Kapel had been part of a team that took an incredible overall approach to learning about their customers. Following tremendous internal data and research projects, the team felt they had arrived at a place where they better understood their customers and wanted to inspire fellow employees to be just as excited and engaged around this knowledge.

"We really wanted to do something different than just presentations or sending

PowerPoints. We wanted to engage people one on one using multiple methods to share and interact with employees."

Jason had heard success stories around Customer Experience Rooms and pitched the idea for the upcoming road show.

During about a six-week period, Jason constructed the prototype room near his desk and didn't ask for much budget. He and others then took the "room" to seven Prudential sites over the next five months.

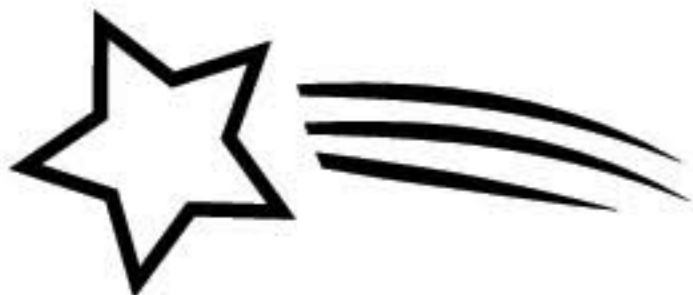
The room included opportunities for employees to learn more about who their customers are, what they thought, and how they were different. There were options to record videos, play iPad games, listen into phone calls and read customer communications. They staffed the room with CX Leaders and visitors had the option of experiencing the room self-guided or by engaging with the team members. Prior to arriving at a site, they cleverly promoted the room.

JASON KAPEL

Jason has been amazed by the success of the Customer Experience Room and the positive comments he has heard from employees. From senior executives to employees across the business, the effort has been both appreciated and engaging. Jason is now working to make a virtual version of the Customer Experience Room that will be able to maintain and evolve that level of engagement.

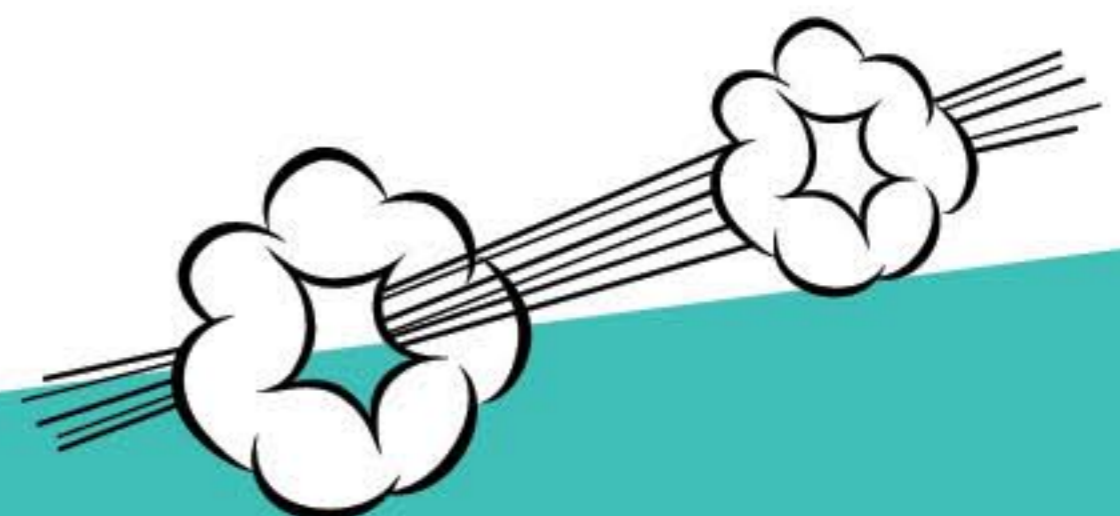
AMAZING RESULTS

- More than 250 employees signed up to be Customer Champions
- Over 150 added comments and ideas to the Journey Mapping Wall
- More than 40 people recorded videos of their Customer Experience ideas
- Around 1,000 employees have walked through the Customer Experience Room to date



ON PROMOTING WITHIN

“We had a huge amount of data, but people didn’t really know what was in this effort. So we created an infographic about our customers and would drop those on employee’s desks with a sticky note invitation to visit the Customer Experience Room. We’d also have an executive breakfast in the room for site leaders, who would then go back and encourage their teams to tour the room.”





SANDRA FORNASIER

Global Director, Customer Experience Specialists
Ciena Corporation

My Pearl of Wisdom...

"Don't be afraid to challenge the norm and accept that it won't always be well received, but eventually, with the right proof points, everyone buys in".

MY CX SUPERPOWER

"BEING PASSIONATE AND FEARLESS"

"I landed in this job because I'm passionate about driving Ciena to further differentiate through customer experience. We are faced with challenges that require us to cut through the complexities of the B2B world. We are the change agents and it requires fearlessness to take on that role. However, with executive support it makes the journey enjoyable and exciting as the changes take form and we begin to see the improvements."



THE IMPORTANCE OF CORRECT SELF-EVALUATION

"You have internal metrics that are right on target, but your customer perception doesn't tell the same story. Internally, are you measuring the right thing in the right way? Are you speaking the same language as your customers?"



MY CX CHALLENGE/APPROACH...

There are people who just exude passion and carry a spark in their eye. Sandra Fornasier is one of those people. Within Ciena, she has a reputation of someone who is passionate for customers and exhibits a grit that could crush even the most challenging of obstacles. So when a few executive leaders within the company brought their

vision to her, she embraced it and immediately began an effort to look holistically at the company and culture, as well as the B2B environment, in order to start adopting a method that would deliver results and would be accepted throughout the organization. It was truly a top-down attitude.

Sandra and her team took a deep look at the current metrics and identified the ones that were not driving the desired changes. They got radical and changed their metrics to be more reflective of their business environment. Then they built a framework to take meaningful action around the metric.

MY EX SUPERHEROES

My peers in the space who take things head on and look for practical solutions to the problems we face.

- a. Jon Windley, CEO and Founder at AltitudeCX, who constantly pushes me outside my comfort zone and has a very creative approach to getting 360 Customer Feedback.
- b. David Rosenzweig, VP of Marketing & Media at Lynden, because he is constantly re-inventing the wheel in communicating and engaging organizations on customer experience.

SANDRA FORNASIER

If I had to do it all over again

"I would have been more aggressive on defining a clear ROI against customer experience sooner. No matter how bought-in an organization is, it helps to align Customer Experience clearly to company financial goals."

MY TOP QUOTE

"We don't assume that industry standard metrics will fit our business reality. We back everything up and want to see the research and understand the proof-points. If you don't have industry proof-points, use the data you and your team have collected to back you up. From that you work to do what's right for your company based on the industry and business realities."

"We left the comfort zone of our traditional metrics that didn't work for our business reality, and instead chose a metric that was simple to understand, actionable and broadly comparable to our competitors and other industries. We knew that if the metric could be relatable to each employee, it would have a bigger impact on further differentiating Ciena through customer experience."

It took guts and conviction for Sandra to approach her executive sponsors with this enormous change. They supported her and Ciena quickly adopted the Customer Experience Index, which she and her team modified to better align with corporate goals. They have broken down silos and have identified actions that relate to the vision and are part of the strategic plan.

Karyn Furstman

Chairman

Customer Experience
Professionals Association

My Pearl of Wisdom...

"It's about changing the hearts and minds of your employees. Make it real for them and help them to understand and believe. You are motivating them to come on a journey that never really ends, and it is a culture, not a project."

MY CX SUPERHEROES

"Jeanne Bliss and
Bruce Temkin: Because
of their work and my
association with them for
over 10 years."



MY CX SUPERPOWER

"Super Glue – I'd say it is the ability
to constantly bring people and
disciplines together within a
company."

MY CX CHALLENGE / APPROACH...

Karyn Furstman looks back at her years as a customer experience professional and is still amazed at the staying power of customer experience. Specifically, how big a differentiator it can be to take care of customers and how big a role it plays in a company's culture.

She describes how critical it is that, regardless of the size of an organization, customer experience is something that must feel real to every employee in every discipline across the company. She describes it as a "top-down, bottom-up and through-the-middle" approach.

What Karyn describes is the essential need to make the connection foremployees—how their individual roles within a company will directly affect the customer experience. Once that understanding is clear, you will then see engaged and empowered employees.

"It takes time, and you have to make it real for them. Many times the most effective way to bring someone on board is to help them see their connection and impact to the customer...it then has staying power."



Karyn Furstman



She stresses the importance of including all in the CX journey and helping to build those bridges to understanding. Once that occurs, the company language and dialog will change and decisions will always be made with the customer in mind.

MY TOP QUOTE

"Start small and build on momentum. Don't just put CX objectives into every employees' goals at the outset, because they need to understand their role first."

SIGNS OF CX SUCCESS

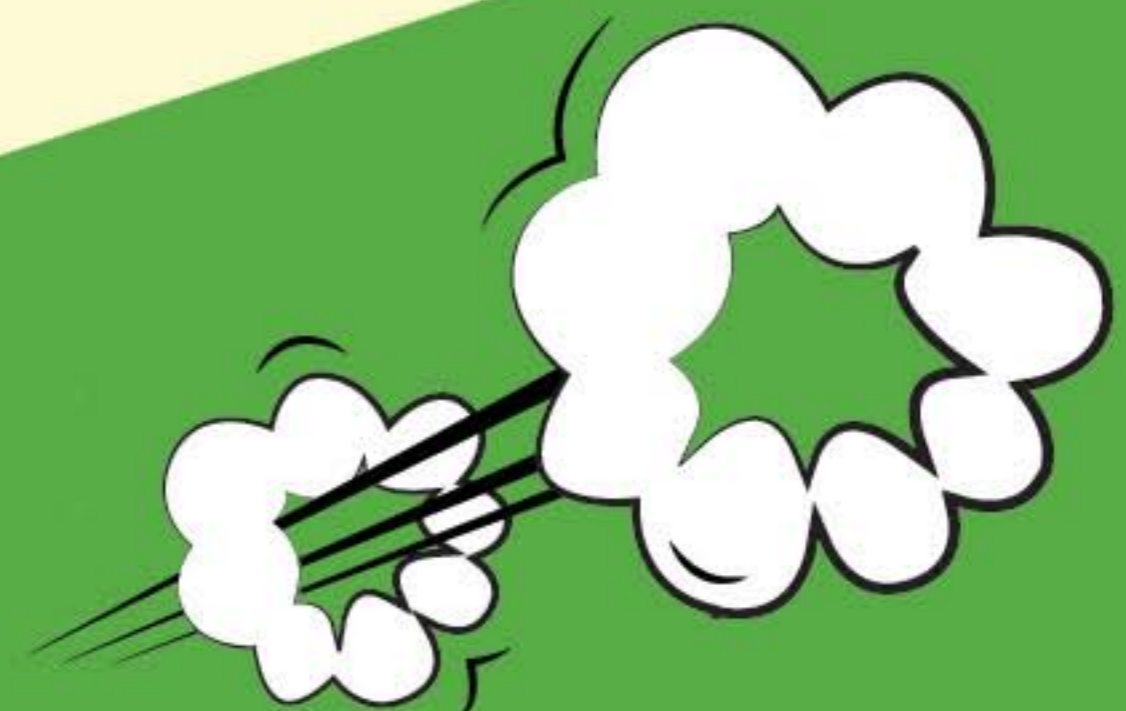
- Employees know what their role is in CX
- Employees are engaged and feel empowered
- The internal language shifts and the customer is "at the table" during key meetings, discussions and decisions

BRINGING MIDDLE MANAGERS INTO THE MIX

- Leaders must establish priority
- Middle managers must know that it's OK to take risks
- Need to celebrate small victories and highlight quick wins

IF I HAD TO DO IT ALL OVER AGAIN

"What I would do now is rally around having the operational efficiency work in concert with the customer experience and work to have those aligned."





Customer Experience Professionals Association™

The Customer Experience Professionals Association is the premier global non-profit organization dedicated to the advancement and cultivation of the Customer Experience profession. We increase the impact and visibility of Customer Experience professionals, facilitate effective member-to-member sharing, and establish respected standards.

Our 2016 community goal is to showcase CX professionals, those of you whose passion for customer experience is driving business results. We will be featuring and promoting stories of business results through a **Powered by CX Professionals** campaign.



Tools for Learning

- Access CX 10 Minute Tools
- CX Webinars
- Library of Content



Online Community

- Member Directory
- Blog
- Ask the Experts



Global Networking Opportunities

- Local Networking Events
- Insight Exchanges
- CX Day



Certification (CCXP)

- Validates credibility and expertise
- Provides a framework for advancement
- Increases marketability



THE END

CXPA

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Professionals Association™

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