CX Metrics For Alignment & Change Management

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We have one big goal for today
“If you can’t measure it, you can’t manage it."

Peter Drucker
What does Oregon Trail have in common with CX measurement?
It is just one of the six competencies needed to transform CX
Many organizations struggle

Inconsistent approaches & metrics (with data sitting in silos).

Metrics & insights are not deemed actionable or don’t drive stakeholder engagement.

Struggle to prove the value of CX.
Metrics help get everyone on the same page
What makes your people tick?

Start by getting to know your stakeholders

• What are their goals?
• How do they define success?
• Do they use metrics? If so, which do they utilize?
• What is their motivation for using CX metrics given their business priorities?
• How would they use these metrics?
• How do they like to consume data & insights?
• What does good partnership look like to them?
Behavioral science tells us how metrics motivate

**Specify goals**: Specific goals lead to better performance than vague goals

**Right-size goals**: Goal difficulty is positively and linearly correlated to performance

**Provide continual feedback to stay on course**: Goal achievement requires continual feedback as individuals or teams progress
Know how insights are best received

What do different stakeholders look for to determine their goals?
Comcast adopted the Net Promoter System®

Customer

Employee

Source: Medallia Case Study "The New Comcast: Empowering Employees to Drive a Customer Experience Revolution"
Help stakeholders see metrics +
Surveys (IVR, email, website, etc.)
Messaging apps
Social media
Online comment cards
Advisory boards
In-app feedback
With employees
Ratings and reviews
Contact center calls
Complaints/formal complaints
Communities
Customer emails/secure email
Chats/chat transcripts
Kiosk
Operational systems + other
Prove the value of CX investments

Source: Forrester report “Why CX? Proof That Investing In Experience Improves Revenue, Cost, And Risk”
Airbnb built on its efforts by incorporating video feedback into its VoC program

Turn your data into stories to drive engagement & action.

Step 1: Set it up
- What’s the problem that needs solving or opportunity we see?
- Why do we need to care about this now?
- What’s the insight/recommendation for action?

Step 2: Convince the audience
- What are the insights/evidence from data that you have about the problem or opportunity?
- What will convince this audience about the recommendation?

Step 3: Agree on next steps
- What action do we need to take to address the problem or opportunity?
- What are the next steps? What do we agree needs to be done and by whom?
Does your executive champion know their role?

Do they...

- Always considering the customer, and advocate others to do so?
- Reinforce adoption of metrics through nudging?
- Encourage collaboration?
- Enable your CX efforts to continue to grow?
Change management must be a focus.

Source: Implement Essential Change Management Practices To Improve Digital Experience Delivery
Don’t be afraid to ask for help!
There are plenty of resources who can help.
Build an infrastructure & culture around your metrics

Aim for a coordinated & centralized approach (across all channels & LOBs)

Make sure you have a communication plan & strategy.

Incorporate recognition & rewards to highlight & incent behaviors.
You’ll know you’re successful when...

They’re knocking on your door.

New questions are being asked & incorporated into your measurement program.

Everyone is speaking the same language.
Thank You.

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