

*In this edition of “The 330”, Mark Harrison, Chair of TribeCX, spoke with Moira Dorsey, recently CX lead at Forrester, about optimizing experience management and how to fine-tune it and drive it forward. Moira also shares details on co-creating programs with the customer and the benefits of working backwards after establishing an end goal. Here are Moira’s key points.*

“The 330” is a series of podcasts where proven senior CX practitioners discuss how to improve business performance through customer experience. Specifically, what works and what doesn’t.

## Getting Started (3 Things)

**Communication** – When launching an experience program, let colleagues know. Not only is it a good way to generate awareness, it indicates to internal stakeholders that they should come forward with relevant insights.

**Develop a Vision** – Your ‘north star’ should be aligned with the brand vision and grounded in the customer’s needs. Make sure your vision has a direct connection to business goals.

**Proof Points** – Identify issues and prioritize them by what’s most important to the business and represents the best opportunity to solve customer problems. Try and find quick wins to show results.

### CX RAW TIP

*Create a roadmap and focus on proof points that show early results so you can quickly build, and maintain momentum.*

## Optimize Different Projects

Where do you want to end up and what do you want to say?

What are the measures that everyone in the business is focused on, including your shareholders: retention, customer satisfaction, enrichment?

Find out what parts of the customer journey will be able to provide data in those metrics. If they don’t confuse audiences, tackle different customer experience journeys at the same time.

### CX RAW TIP

*Start at the end and work backwards, looking for data and evidence to prove progress along the way.*

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## Addressing Large Projects

For larger projects focusing on customer experience, it often makes sense to use a staged approach, launching it in conjunction with a subset of colleagues for a subset of clients. By taking an agile approach with internal teams, it becomes a controlled experiment. This enables the CX team to make improvements by refining the subset as clients progress through the exercise. But, most importantly, it enables you to show proof points at different stages through the process.

### CX RAW TIP

*It's a good approach to co-create with the customer. Try something, learn from it, adapt to it, and then reintroduce it.*

## Smaller Projects

While you're working on a large customer experience initiative, continue tackling smaller ones. These CX projects are often addressed with a portfolio approach to distribution, as it is easier to move an important business metric across an organization. Using data and coordination and then fixing the issue to make the best customer experience. Balance the fast and the quick, while again building proof points.

### CX RAW TIP

*Proof points convince all your stakeholders that you are making a difference.*

## Best for the Customer

Colleagues have a very strong desire to do what is best for the client. While you instill a culture of improved customer experience, you need to make sure you get it right. Often, colleagues will take only pieces of the improvement program. For it to be successful, they need to use it in its entirety and ensure they stick to the prioritization. Once you have harnessed that willingness and energy in colleagues, you can orchestrate activities in a way that add the best end-to-end experience for the client.

### CX RAW TIP

*Tap into what's there with customers and colleagues, then channel and establish the framework.*

## Discipline

Often you will have to change colleagues' perception of experience to change the culture of experience. Great intentions for the customer may not be the most important thing for everyone. The discipline of customer experience is to make it work for the customer AND colleagues AND the business. Make sure that while you're setting up the essential, foundational pieces of your CX program, colleagues are doing what's best for all three, not just what they think is right for the customer.

### CX RAW TIP

*Make sure your CX programs translate good intent into great action for customers, colleagues and all stakeholders.*

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## Optimizing the Experience – I Wish I'd Known

I wish I'd known to have a set of scenarios planned out so that I could quickly reset expectations about project timing to align with staffing and budget changes. Make sure you're regularly updating colleagues on where you want to go and provide training, while having the right measurements in place for journey analytics. Stay focussed on finding and fixing the programs in the existing experience, while continuing to invest in CX in the form of training.

### CX RAW TIP

*To truly optimize experience management, it must be continuously fine-tuned to keep it moving forward.*

*In closing: Lots of organizations have good intentions, but it's about getting foundational pieces in place and building the muscle. Intentions are great, but they don't necessarily move the needle in the short, mid or long term.*



**Mark Harrison, Chair**

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I've been an active CX professional for over 20 years. As CX lead for Shell's global customer experience initiatives, I was responsible for ensuring that the customer experience strategy and operations were best in market.

*TribeCX, for CX people by CX people*

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