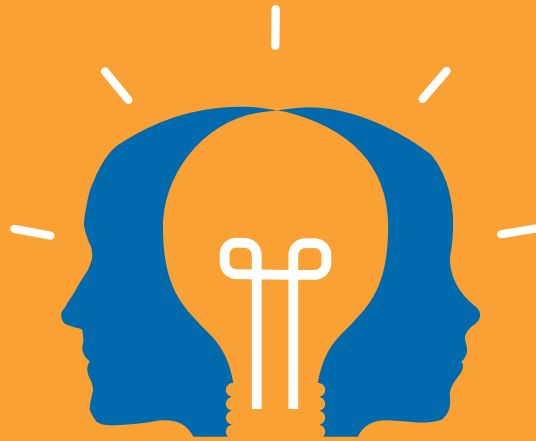




THE CX COMPANY  
SYMPOSIUM

ROUNDTABLE SERIES



# INSIDE THE MINDS OF **GLOBAL CX LEADERS**

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Turning best practice CX  
into immediate actions





**Welcome** to our first CX Symposium ebook which seeks to understand why CX champion organisations around the world outperform their competitors on every single business metric. Through an online roundtable discussion we engaged with key business leaders and CX practitioners across the globe to capture inspiring and actionable insights based on their many years of CX across all sectors.

Our first roundtable discussion explored future challenges and opportunities we need to focus on today that will successfully benefit our business tomorrow. By understanding and monitoring what's around the corner, we are best positioned to guide ambitious business growth by understanding which CX actions will deliver the greatest impact.

We learned that the rewards from delivering remarkable CX are enormous and immediate. Especially when the focus is on actions that impact positively on customer rather than actions that just make life easier for the company. Rather than seeking a silver bullet that doesn't exist, companies must realise that what is required is a connected approach that manages CX investment in the right areas.

However, some of our experts remain concerned about the impact of CX. Trillions of dollars have been invested in improving CX delivery but yet CX scores continue to fall and customers around the globe are not feeling the love that they are being constantly promised.

In this first e-book of our series, you'll find the key thoughts and insights from our expert group on each of our discussion topics. We've also put in suggested actions to help you address the challenges and concerns that were raised. We hope you enjoy this ebook and please do let us know your thoughts, we'd love to hear your feedback and suggestions to improve. You can contact us directly or through the interactive comment fields that are on each page. And please share with any colleagues and friends who you feel would be interested in reading it.

A handwritten signature in black ink, reading "Michael Killeen". The signature is fluid and cursive, with a long horizontal stroke at the end.

**Michael Killeen**

*Chairman of The CX Company  
and The CX Academy*

# Our panel of CX experts

The CX Company carefully selected a world renowned group of established CX experts to discuss and share insights to benefit CX practitioners across the globe.

Our panel is selected from different sectors across international markets. They work for large established enterprise businesses as well as start-up organisations. They hold leadership roles along with heading up CX delivery in their companies or acting as CX consultants in their own markets.



**Martin Canwell**  
*Aptean*



**Tasha Payne**  
*Thales Digital Identity & Security*



**Paul Bailey**  
*Irish League of Credit Unions*



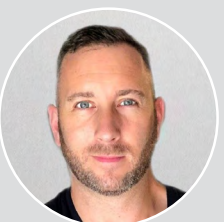
**Evelyn Moynihan**  
*Kilkenny design*



**Gemma Pezet**  
*UK CX consultant*



**Brian Horgan**  
*The CX Academy*



**Damien Dineen**  
*National Broadband*



**Peter Furness**  
*Tesco Mobile*



**Diane Magers**  
*Experience Catalysts*

As our roundtable symposium grows we will continue to add more experts as we cover new topics in each session. What all of our experts have in common is that they are CX practitioners who are focused on delivering exceptional employee and customer experiences day-in, day-out.



**Andrea Saitta**  
*Air Liquide*



**Gerry Culligan**  
*Iarnród Éireann/Irish Rail*



**David Conway**  
*KPMG Nunwood*



**Jessica Eberbach**  
*Tricap Residential Group*



**Michael McCarthy**  
*Virgin Media*



**Edward Mackey**  
*Revolut*



**Cathy Summers**  
*The CX Company*



**Siobhán Mallen**  
*The CX Company*



**Jeff Sheehan**  
*The CX Company*



## Topic question:

Is CX misunderstood and what impact does this have on its progress?



## INSIGHTS

- 1 Yes, CX is misunderstood which is proving a major hurdle for the discipline's growth.
- 2 Large consultancy groups and many enterprise practitioners use complicated jargon and acronyms to make them look like the smartest person in the room. They apply this jargon in their everyday CX language, making it much more complex and confusing than it needs to be.
- 3 This business language complexity is holding up CX investment because business leaders won't support initiatives they don't understand. And unfortunately, investments then trickle into cost-saving technology plays under the guise of CX causing an unfair imbalance of technology vs human support.
- 4 CX is a simple and a brilliantly effective discipline that each of us experiences as customers every single day. We all get it, so why confuse it?
- 5 CX has been around for hundreds of years and we have to do everything in our power as CX practitioners to stop it from becoming fluffy and a boardroom fad.
- 6 Thankfully, we are witnessing the arrival of Customer Experience Officers, (CXO's) who are becoming more proficient on company boards and helping leaders make decisions to get the best out of the CX investments.



Board support for CX has reached full throttle in start-ups who understand that CX is a key way to differentiate against their more established competitors who are held back by the complexities of legacy issues and what CX means.



## ACTIONS

- 1** Call out colleagues and business consultants who complicate the CX discipline. Challenge presentations that are complex and get the authors to simplify them so management can understand and quickly act on them.
- 2** For CX communication initiatives stand in your customer and employee shoes. If a 12-year-old doesn't understand the messaging, it's not fit for purpose. Restart!
- 3** Create a CXO role that will work with all departments and report into the CEO directly.
- 4** Use the CX Academy's standard definition of CX so everyone in your organisation is clear what it is. CX is how a customer feels about every interaction they have with you. It's about emotions. Customers judge their experience on what they expected so did you fail, meet or exceed their expectations.



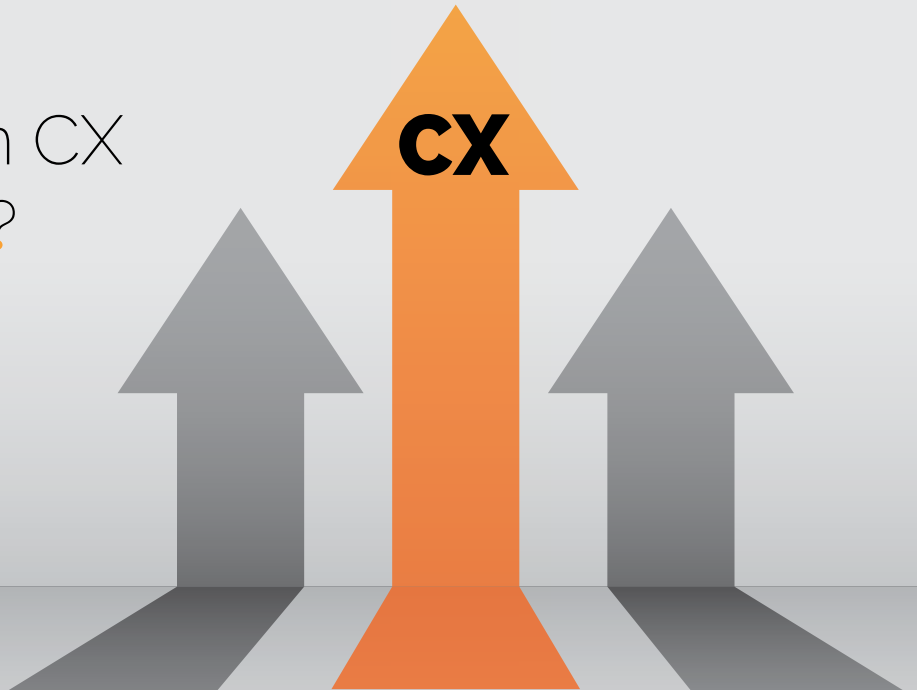
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## Topic question:

Will investment in CX continue to grow?



## INSIGHTS

- 1 Unfortunately, regulatory requirements has been a key driver of many CX investments rather than a genuine desire to do the right thing for customers. It becomes a "have to do" rather than a genuine "want to do".
- 2 Investment in Customer Experience will continue to soar with digital transformation technology spend alone expected to reach \$6.8 trillion by 2023.
- 3 The major tech suppliers have moved from selling CRM solutions towards selling CX and EX solutions to support the delivery of CX Excellence.
- 4 Investment in employee skills and training will continue to grow but needs greater balance with technology investment.
- 5 Technology wins the investment battle every single day. Not because it is always the right solution but because they have the best sales talent on the planet.
- 6 CX practitioners have to stand up for a greater balance of investment in human touch initiatives.
- 7 Billions of CX dollars are being unwisely spent in favour of technology that customers don't see or feel. The consumer today still has a preference to speak with a human being especially if there is a critical or complex issue to be resolved.
- 8 Tech advancements continue to confuse and anger boardroom decision-makers because they witnessed a raft of poorly managed tech investments over the past three decades. It is widely reported that only 1/3rd of tech projects are deemed successful. Decision makers continue to throw good money after bad. Boardrooms have fallen into the fly trap of the never-ending spend in tech projects which create major business headaches.





Investment in accurate CX measurement will continue to rise as leaders require hard and soft measures to be blended that allows for better decision making and enables the release of more CX investment.



## ACTIONS

- 1 CX practitioners need to stand up and seek absolute ROI from tech vendors and tech colleagues that promise everything from a tech solution that generally will deliver little.
- 2 CX practitioners must clearly articulate the tremendous value of delivering CX Excellence for the customer rather than the cost benefits to the business.
- 3 Stop focusing on short-term scores, results and unconnected project completions. Instead, focus on the longer-term benefits for the business and the harder, bottom-line measurement.
- 4 The investment will be approved when you articulate the value at the c-suite level. CX practitioners need to shift from the softer NPS focus into harder measurements such as increased sales, reduced cost to serve, lifetime value, churn management, and natural advocacy.
- 5 For every dollar spent on tech solutions we should seek a 25% matching fund in human touch investments.



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## Topic question:

How do we change the management mindset of doing what is right for the customer versus what is right for the company?



## INSIGHTS

- 1 The goal for most c-suite teams remains focused on how to get customers buying more whilst reducing cost. Leadership teams continue to believe they must make greater profits for shareholders, which funnily enough, benefits their own pay cheque.
- 2 The profit-only approach has dramatically changed with the advent of Covid which focused businesses to do what's right for their staff, customers, and their communities over what is right for shareholders.
- 3 Companies that stand for more than simply making profits outperform their competitors the world over.
- 4 Identifying and delivering a purpose that impacts positively on communities, customers and employees is the way forward.
- 5 A shift towards cross-functional teams in the future will take place but is a major challenge for large enterprises to execute.
- 6 Every CX champion company has a full commitment from the top, and each and every one of them recognise they have not reached their peak in the never-ending journey of delivering CX Excellence to their customers.
- 7 Customers are much more informed, connected, and sceptical and are moving from buying from a company to buying into a company's purpose.



Every successful transformation comes with a visionary CEO who is committed to customer improvements and needs. If the CEO doesn't get CX, no traction will take place. If the CEO is more focused on the shareholder than the customer you are wasting your time.



## ACTIONS

**1** We have to face up to the challenge to educate C-suite on what CX does for the bottom line to ensure we get buy-in for CX investment.

**2** Create your purpose from the bottom up as the staff are the ones who are responsible for delivering it to customers and communities every single day.

**3** Bring your mission, vision, values, brand promises, and business goals together to design what your CX management programme will intentionally do for your organisation and its customers. Building alignment of your CX mission provides meaning and purpose for employees to rally around and delivers more value to your customers.

**4** If your delivery supplier is late or the goods are damaged, own the problem and make it right. Customers are sensitive to excuses businesses offer when things go wrong. Customers see your suppliers, like delivery companies or outsourced call centres, as part of your company so you need to work with them very closely to ensure they are delivering the experience your customers want.

**5** Challenge governance bodies to become customer-centric. Governance bodies need to stop creating tick box exercises for companies to strictly follow. They need to sit down with the customers of the businesses they monitor and ask the customer whether their policies are of benefit to them.



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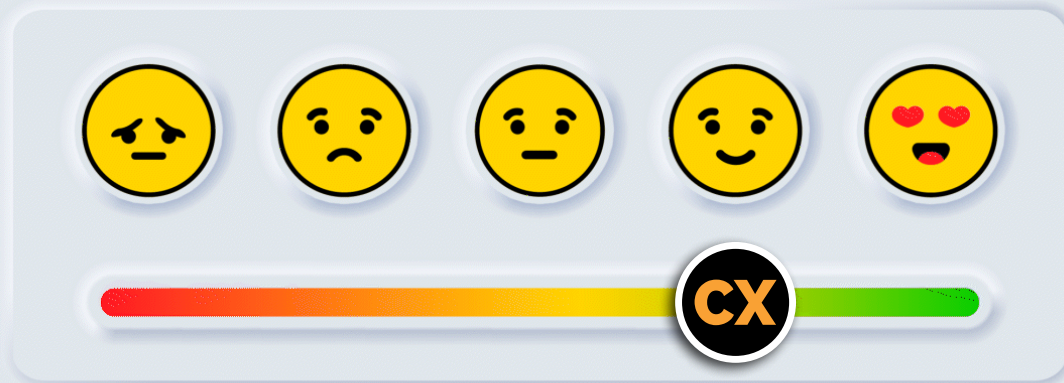
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## Topic question:

What is the most insightful way to measure CX Excellence?



## INSIGHTS

- 1 Many companies focus on measuring CX at a tactical, short-term, project level rather than taking a longer-term, more strategic view that considers the overall business benefits.
- 2 NPS is one of the main measures of CX but it is only one aspect. It tells you that customers would recommend you but it doesn't tell you why. It can also vary quite considerably based on when you use it and which customers you survey.
- 3 CX practitioners are still unable to fully articulate the tremendous value of delivering CX Excellence over the long-term. To obtain long-term investment they need to be able to speak the language of the c-suite and focus on measurements such as increased sales, churn reduction, lifetime value, improved costs to serve and reduction in acquisition costs driven by advocacy.
- 4 There is no silver bullet in terms of measurement. Each company needs to select the right mix of measurements for its own circumstances. It's all about what's most important to the company and what's most important to its customers.
- 5 CX measurement shouldn't just tell you what you've done, it should also be able to tell you what you should be doing. Your metrics must inform and drive actions to improve your CX delivery.



Using the right measurement scores for different internal audiences is key to gain investment, i.e. talking about ROI with a CFO is critical, employee scores with HR is critical, churn reduction with opps is critical, acquisition scores with sales is critical.



## ACTIONS

- 1 If you are using NPS as a key CX metric look at how you help to build and reinforce the story with other metrics.
- 2 Much of the richest data from NPS comes from the verbatim. Direct customer quotes can be extremely powerful so use them to build your story for CX investment.
- 3 Build your CX metrics dashboard using business metrics (sales, churn, retention etc), operational metrics (first call resolution, level of returns etc), customer metrics (NPS, Emotional Drivers etc) and employee metrics (satisfaction, engagement etc).
- 4 Ensure your metrics drive action by reviewing, discussing and identifying gaps with a cross-functional CX task force.
- 5 Use metrics to back up your request for investment to your leadership team.



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## Topic question:

What role will  
Employee Experience  
have on CX's future?



## INSIGHTS

- 1 Employee Experience (EX) is creating a lot of positive noise and is creating a lot of discussion at the boardroom table as companies recognise that EX feeds CX delivery.
- 2 Happy employees = happy customer = happy shareholders is an accepted approach to business success. It's becoming clearer that CX is a human trait wrapped deeply in employee emotions.
- 3 We have all been starved of human interaction during Covid and there is a real hunger to get back to personal, one-on-one interactions. Human interaction, particularly face-to-face with staff makes customers feel closer to an organisation which is closely linked to CX success
- 4 We need to see more investment in empowering staff, creating the right tools for them, and educating them to deliver better experiences for customers and colleagues.
- 5 Frontline staff are more important than ever and need to be rewarded accordingly.
- 6 Higher salaries are not always the right solution. We need to evaluate what each employee is looking for first and act accordingly. If we simply pay more, we need to justify this by making more money from this approach and this still has to be proved.
- 7 Proper career progression is far more important. Employees need to be cherished more and receive better CX education.
- 8 There are huge benefits to maintaining employee retention. They do so much more than simply make sales or sort out customer issues. Employees today want more flexibility in their working lives.





Employees want to do something fantastic every day. We don't want to measure the number of calls per hour. We want to measure how we have helped customers have an amazing experience.



## ACTIONS

- 1 Do something amazing for those employees who showed up during Covid. The pandemic has revealed who your essential employees are and how essential they are to serving your customers. Frontline employees such as delivery drivers, supermarket workers, and nurses all showed up for work when the rest of us worked from home. Now is the time to recognise these critically important employees.
- 2 Create a workshop to find ways to leverage your human touch. Use your staff to identify these actions as they will be the ones delivering them.
- 3 Deliver a workshop on how to humanise your digital process.
- 4 Improving CX is directly linked to the hiring and supporting of your essential employees and should be a cornerstone element of your CX management programme.
- 5 Invest in CX emotional training for all staff.



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## **Topic question:**

How can we deliver amazing cross-functional CX initiatives?



## **INSIGHTS**

- 1** Successful CX people partner with other departments to help create cross-functional solutions.
- 2** The removal of silos is not happening at speed in mature companies. We see it regularly in start-ups but it's proving a difficult transition in larger enterprises.
- 3** CX practitioners need to be able to effectively engage with the leadership team and department heads. This is a key skill and requires different approaches with different people.
- 4** To achieve real business impact as a CX leader you need to get the support of all of your stakeholders, many of whom don't report to you. Listening, actioning and ensuring customer needs are met is paramount to drive and demonstrate ROI from your CX programme.



In the new reality the move towards cross-functional working has come of age. Following the pandemic, the majority of CEO's believe they need to revisit their company structure and determine how their business will align as one customer unit rather than many different departments.



## ACTIONS

- 1 Set up a CX Task Force of cross-functional employees who will work collectively to influence and deliver key CX initiatives across the company.
- 2 Bring external partners and suppliers into your CX action planning workshops to ensure they are on the journey with you.
- 3 Explore how you could better deliver CX Excellence by re-structuring your company and removing departmental silos.
- 4 Think about how your customers would like you to structure your company and look at what change that would require.



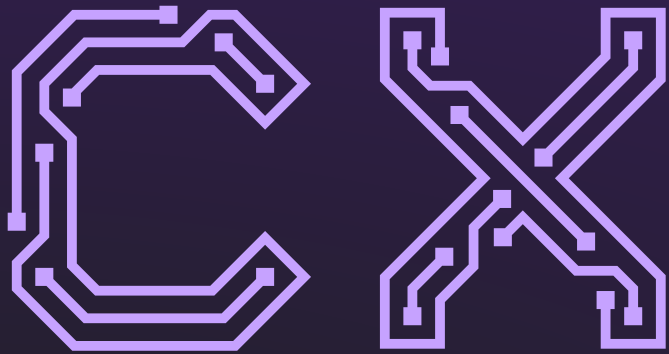
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## Topic question:

What role  
will technology  
play in  
CX future?



## INSIGHTS

- 1 Tech is here to stay and will play a key role in making things easy and convenient for customers across all sectors.
- 2 Covid accelerated the growth of customer interactions done through digital channels which was a necessity during lockdown. Companies struggled and many got their online delivery horribly wrong.
- 3 Digital interactions are predominantly transactional, providing little opportunity to create the emotional connections required to develop and sustain long-term customer relationships.
- 4 The temptation to increase investment in digital is a very real one because if done right it can yield cost savings. However, there is a real danger that if technology developments are focused on the needs of the company rather than the needs of the customer, and the right supports are not provided, the delivery of CX will be exacerbated rather than improved.
- 5 Tech has been used more to reduce costs rather than to benefit the customer.
- 6 Tech opened up a new channel for many sectors during the pandemic and will continue to play a key role for companies' growth.
- 7 Those businesses that have made tech their key differentiator are fooling themselves if they think that this is sustainable in the longer term..



Customers are never really looking for technology, they just expect it based on their experiences with other companies and other markets. This means that sometimes customers' needs are ahead of what companies can provide



## ACTIONS

**1** Look at how you can put the human touch into digital channels e.g offer a transfer to a human when a bot is unable to answer a question or inserting a handwritten note into online orders.

**2** Covid accelerated digital transformation plans for many organisations but may have left the customer out of the loop. Now is the time to design the user experience by people, for people and improve adoption and satisfaction with the use of digital channels.

**3** Identify ways that your digital channels can deliver more personalisation by using customer data effectively.

**4** Create access to real-time tools to serve customers and for customers to self-serve.

**5** Use your digital channels to enable experimentation and real-time customer feedback to invent, learn, and refine what works for customers



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## Topic question:

What are the key CX actions to take for future success?



### ACTIONS

- 1 Far too much energy is being given to internal strategic planning. Companies need to do more around actions that customers can see and touch so they genuinely feel the love.
- 2 Too much investment has been swallowed up by internal process and transformation improvements that the business benefits from rather than the customer. You need to get a better balance on this. What's in it for the customer. Will they benefit? If not then you're doing it for the wrong reasons.
- 3 Get buy-in from the leadership team for CX based on how it will benefit customers, employees and the business. Not just on how it will reduce costs to serve.
- 4 Create a purpose that motivates employees to walk into work every morning knowing they are going to deliver a remarkable experience to their customers today.
- 5 Get your leadership team to walk in your customers' shoes regularly rather than scanning reports and ticking a customer centric box.
- 6 Get your leadership team and colleagues to walk in each others shoes to understand what matters most to each employee.
- 7 Learn from the best and move out of your sector to seek richer insight on how to improve your CX delivery. If not, you will fall into the status quo and you will all end up looking alike.
- 8 Take a cross-functional approach to CX actions to remove silos and ensure success.





We have been looking at CX for 22 years which means it's not a fad. Great organisations are picking out the things that work best for their customers. I see a change in companies using agile development at scale to help break down barriers and move strategies into action.



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