
Create a Team of CX Heroes on Your Frontline

How to change the
fabric of your
company's culture



For many employees, Customer Experience is just a number on a scorecard.

This type of thinking contributes to a pervasive frustration with Customer Experience (CX) – and with Voice of the Customer (VOC) programs, in particular. To create real change and tangible outcomes for your company, CX must be ingrained into the very fabric of your company's culture.

In this article, you'll learn a 7-point methodology for making CX – and more specifically, VOC feedback – an embedded part of your company's DNA.



Case in Point: A tale of two CX cultures

Company 1: Employees living and breathing CX metrics

After installing equipment inside a customer's home, a technician left an instruction sheet telling the customer to give him "all tens" on a survey that would be coming after the installation. The technician even went as far as to say his employment would be in jeopardy if he wasn't given all tens. This is an example of what happens culturally when a company defines CX as a score or survey.

Company 2: Employees living and breathing CX culture

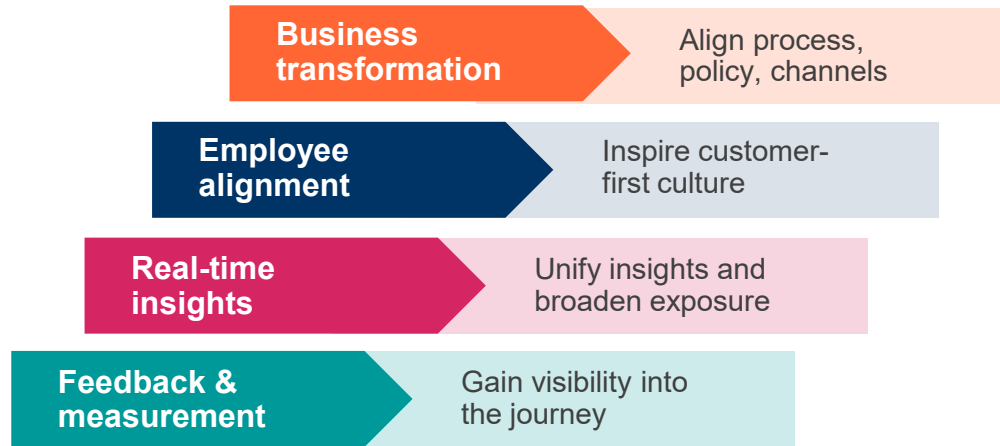
An employee for a grocery delivery service realized she had left some of a customer's grocery order in the back of her car after a delivery had been made. As soon as she realized it, she drove back to the house and delivered the remaining groceries along with a handwritten note. It's worth pointing out that this company also has a survey to

gather feedback on the delivery experience.

This example highlights the importance of being less concerned with a score or survey and more focused on delivering a great experience and in this case, one with a personal touch. In other words, the culture of CX was reflected in this employee's thought process and decision-making.

The image shows a 'CUSTOMER SATISFACTION SURVEY' form. At the top, there are handwritten notes: 'All 10's' on the left and 'JoJo' on the right. The form has a header with the company logo and the text 'CUSTOMER SATISFACTION SURVEY'. Below the header, it says 'DEAR VALUED CUSTOMER:'. The main body of the form contains a survey grid with various questions and a 'PASSING SCORE' section. Handwritten notes in blue ink are visible on the left side of the form, including 'Hello!', 'This is a product that fell out of your bag, into my car while I was shopping today.', and 'Thank You For Using Instacart! -Cecelia (your shopper)'. The survey grid includes questions such as 'Please rate MY appearance and professionalism', 'Please rate MY attitude and pleasantness', 'Please rate ME on how well I discussed dish placement, calling, and receiver locations', 'Please rate ME on verifying that the Network system and programming works properly', 'Please rate ME on respecting your home and cleaning up after the service was completed.', 'Please rate how likely you would recommend ME to friends or family if they were to have the same service performed.', and 'Enter "3" if I completely resolved your issue, or "2" if you feel your issue was not resolved. If scored a 2 in this category...'. The 'PASSING SCORE' section shows a score of 10 out of 10.

Stages of CX Maturity



The transformation from “scorecards and metrics” to “a culture of CX” begins when organizations start to think more broadly about the requirements and expectations for their VOC program. Many companies hyper-focus their VOC initiatives on the first two stages of CX maturity, which are primarily centered around collecting and basic distribution of customer feedback. The third stage is about inspiring employees to think and act with a ‘customer-first’ mindset.

The higher your company is on the maturity ladder, the larger your ROI.

The primary focus of this paper is on creating a customer-first culture—the third level of CX maturity. It pays to focus keenly on graduating to this stage because your frontline employees are the ones who ultimately carry the day when it comes to delivering experiences.

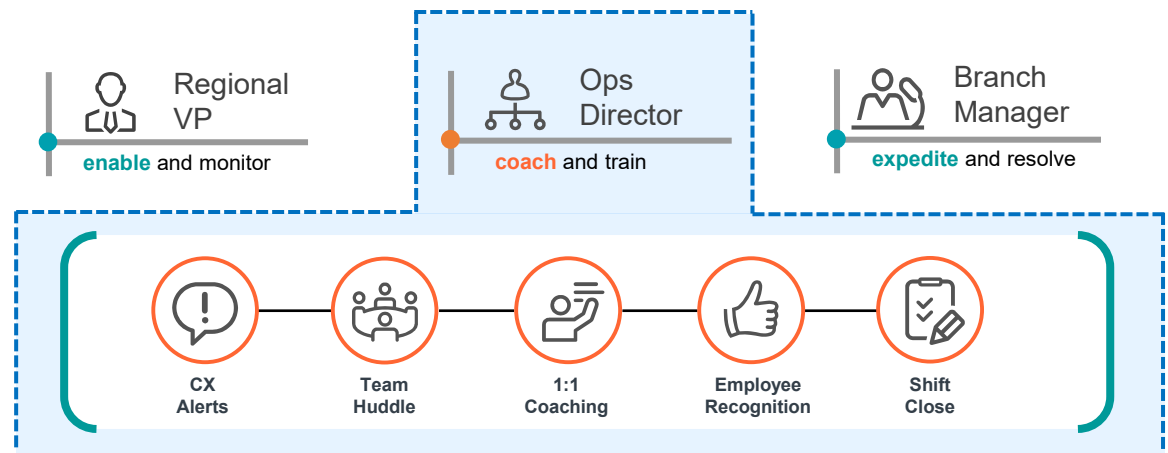
1

Build a daily action framework for CX

Many companies try to infuse CX into their teams' daily actions by deploying dashboards or by training employees on a scorecard (like the technician example). More mature – and ultimately more successful – CX organizations go far beyond dashboards, instead teaching employees how best to use customer feedback. **Daily Action Frameworks** for different employee personas empower employees with a structure and supporting processes to infuse CX thinking and action directly into their daily responsibilities.

Consider the Branch Manager at your local bank for a moment. A Daily Action Framework would guide and teach them:

- When and how to follow-up with customers after a survey
- The best approaches and frequency for integrating CX dialogue into team meetings
- Strategies to more effectively coach and develop tellers using customer feedback
- Innovative techniques to recognize and rewards on CX performance
- When to monitor CX performance throughout the day or week – and what to look for

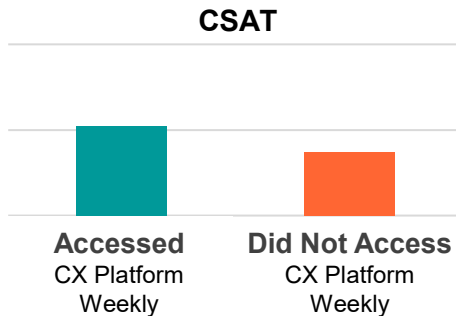


Empower with self-coaching tools

Empowering frontline employees to think and act customer-first requires more than a weekly coaching discussion with a manager. There is serious value in frontline employees being able to access their own customer feedback in real-time. It puts the employee in charge of their own behavior, allowing them to adapt, adopt and be more nimble. This creates an environment – a culture – of employees taking independent responsibility for their own actions, equipping them with the tools to become the CX leaders they know they can be.

Case in Point

Employees committed to self-coaching performed **7 points higher** on CX metrics



*"I feel **more empowered** to deliver a great customer experience."*

Client Frontline Employee

2 Don't underestimate self-coaching



3 Energize teams with daily CX huddles

Nearly every customer-facing employee participates in a weekly team meeting in some form or another - from retail associates and contact center agents to bank tellers and field services technicians.

Too often, these team meetings are focused on operational tactics and management updates, rather than the customer's experience and perspective.

This is the cultural shift we're talking about. CX should be at the forefront of these conversations, as it helps put the customer and their experiences, emotions and needs at the top of every employee's mind.

When CX huddles are implemented correctly – using the right structure and frequency – the impact on culture and results is BIG. Have a look at the above case study, to see just how big the results can be.





smart move **BIG** results

We partnered with a financial services company to determine whether daily or weekly huddles were more effective in improving service metrics. We found that sites executing daily huddles saw increases in CSAT and FCR.



Fewer Repeat Issues

Daily huddles demonstrated
twice the lift in FCR vs
Weekly Huddles



Great Experience

Daily huddle site saw
8X improvement
in CSAT



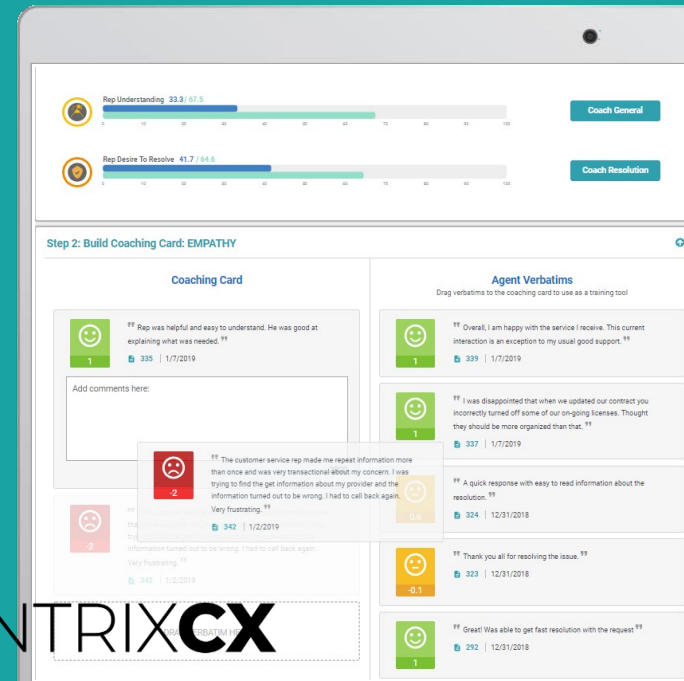
Personalize CX coaching

One-on-one dialogue between managers and employees is a powerful way to nurture a customer-first mindset. But managers need guidance on where to focus the discussion and how to deliver personalized, CX-focused coaching. Since every employee is in a different place on their journey to embracing CX, the manager must understand this and address their needs accordingly.

To help take some of the burden off of the manager, there are various technologies that provide some assistance, allowing managers to zero in on specific CX issues for each individual employee. This helps guide their one-on-one discussions and personalizes the coaching experience.

Software tools can take your managers and team leaders 60% of the way in their coaching work, allowing them to spend that last 40% personalizing their coaching to the employee and what they can do differently to improve CX.

4 Proactively guide 1:1 dialogue



CONCENTRIXCX

5 Incentivize differently

Most companies incentivize on CX metrics using monetary rewards. There's much debate as to whether or not this is the right or most effective approach, but the reality is, turning off a monetary incentive program that's been in place for years is a challenging undertaking which may not accomplish much in the short term. That said, there are other "incentive" avenues to tackle culture change, which can be done without a massive overhaul to existing compensation structures.

Development

Cover team priorities

Discuss employee performance against team focus areas; provide context for where they fit in the 'big picture'

Discuss individual priorities

Tailor coaching sessions on employee learning needs (call types, behaviors) based on coaching preparation

Make it interactive

Ensure engagement using an interaction communication style (ask questions, role-play, involve the employee in solutions)



Recognition

Give a **badge** through the platform

Name on **wall of fame** with number of 'exceptional surveys'

Employee **mentioned in huddles** for recognition

Employee entered in drawing for **raffled goodies**

Opportunity to **lead a huddle** and share best practices

Reward behaviors, not metrics.

Consider creating a supplemental rewards & recognition program that focuses on finding ways to reward behaviors that reflect the customer-first mindset you're trying to achieve. It could:

- reward participation in team CX huddles
- reward employees that display a desire to improve
- reward an employee who “thinks outside the box” to solve a customer’s problem

And sure – money is great, but there are other effective techniques for influencing employee behavior. For example, peer recognition, entry into raffles and leadership opportunities to facilitate team huddles, work as well.

So, how should you get started?

First, talk to your employees. Ask what motivates them, what inspires them, what you can do to help them get to the next level of delivering CX. Model the design of your supplemental CX rewards program based on their feedback. You might be surprised at how effective it is.



6 Make it fun!



Simple changes, big impact

Individual Performance Scorecard

First name: Elizabeth
Last name: Jones
Title: Recruitment Specialist
Manager: Judy Smith
Employment type: Permanent
Review period: 01-JAN-2013 - 31-DEC-2013

Ratings for qualitative measurements and end of year results

	3	2	1	N/A
Exceeds expectations				
Meets expectations				
Below expectations				
Too early to rate				

Strategic perspectives with assigned objectives and key performance indicators (KPIs) for individual level

	T1	T2	T3	T4	Target	Final Results	Comments
1. Customer							
1.1 Maintain high levels of internal							
* Feedback from hiring managers		2	2	2	3	2	
1.2 Develop employer brand							
% Entry-level owned requisitions advertised on campus job	65%	70%	75%	95%	75%	3	
# Career fairs attended	1	1	1	1	5	1	
2. Processes							
2.1 Optimize recruitment and retention							
# Owned open requisitions	4	4	5	6	5	2	
# Time to fill owned vacant position	25	30	20	20	30 days	3	
% Hired employees that stayed for at least one year	80%	88%	86%	83%	80%	3	
% Temporary staffing outsourcing project objectives achieved	25%	50%	75%	100%	100%	2	
% Own requisitions closed on time, on budget and according	100%	97%	99%	98%	95%	3	
2.2 Improve HR service delivery capability							
# Process improvement suggestions made and approved for	0	1	1	1	1	2	

Would a dashboard with metrics and arrows inspire you? No way!
Remember to make CX fun for employees.

Instead of using basic scorecards and dashboards, consider delivering customer feedback through a graphical, interactive interface. Make employee performance come to life through visual representations of feedback, using emojis or smiley faces. Apply gamification where possible to drive interaction with customer feedback.

It might sound simple, but these concepts have a big impact.

Many employees are on the frontlines servicing customers every single day. And guess what – they have ideas on how things could be better too!

To inspire a CX driven culture, employees must buy in. And getting employees to buy in is achieved by making them feel like they are part of the strategy and the problem solving, as opposed to making them feel like they're just the executors. What better way to get buy-in than by giving your employees a powerful voice to drive CX improvement initiatives?

If you don't already have one in place, consider starting an Employee Elevations Program, which is a mechanism for collecting, analyzing and acting on employee ideas for CX improvement

7 Give employees a voice ... and listen



Case in Point: CX heroes on the frontline

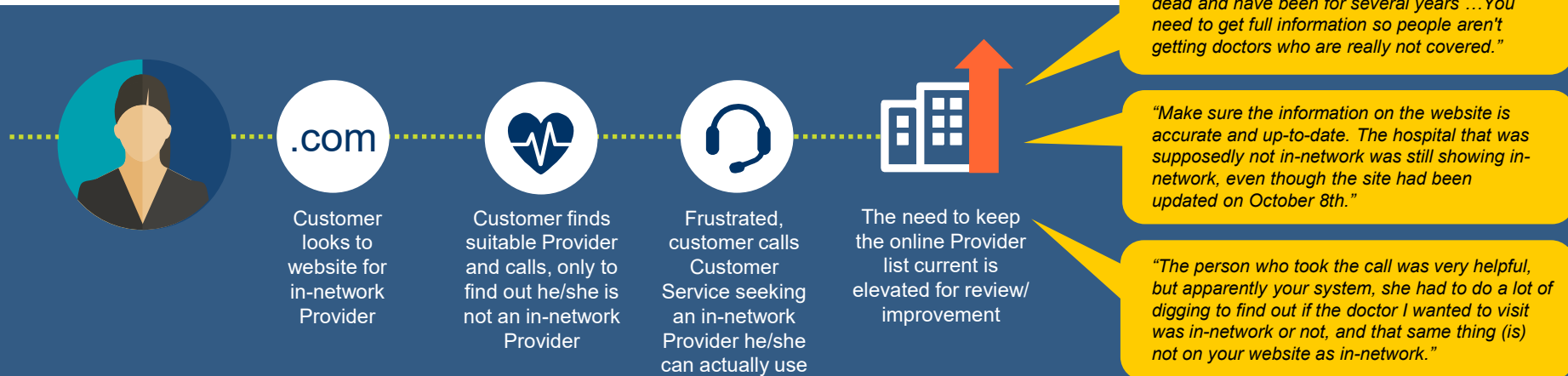
Here's an example of the impact you can have on CX if you're able to harness input from the frontline teams in a structured format.

For a healthcare company, customers were going online to search for in-network providers. But when they got there, they discovered the directory was not always up-to-date, especially for certain segments of Providers. This led to them calling the 1-800 number, which added far more time and effort to the customer's journey than necessary.

Thankfully, a frontline employee realized this and submitted a **CX Elevation** regarding the need for better real-time, online

updates to certain segments of the Provider directory. This idea was quickly vetted by the CX team and improvements were executed in a short timeline. The result? A 7% reduction of calls to customer service regarding the provider network, and an obvious impact on reducing customer effort and improving CX.

Results like this also provide a nice business case proof point for funding your VOC programs and provides clarity on the ROI the program is delivering for the organization. The end game? A massive improvement in CX.

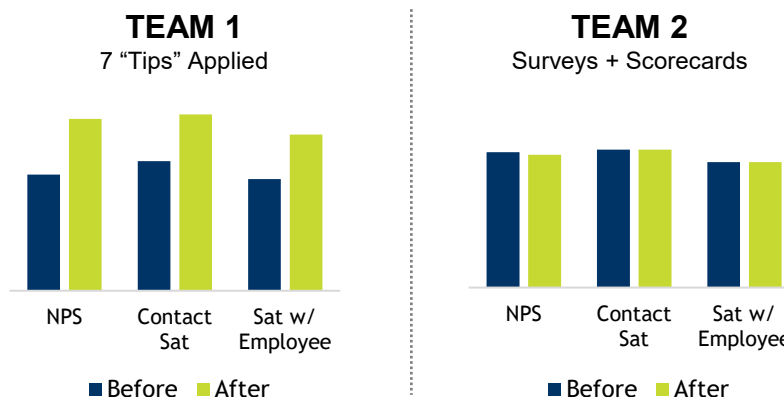


Case in Point:

Cracking the Code of Culture Change

We put the seven guidelines into action ourselves. We measured two teams for the same client, on the same frontline, over the same timeframe. One team had access to survey results and real-time dashboards while also applying all of the tips discussed earlier. The result? Double-digit score improvements across the board for CX, which one might consider a massive win.

The second team, which had access to the same survey results and real-time dashboards, but weren't guided through the tips, had virtually no improvement whatsoever. This just goes to show that when there isn't two-way-dialogue or a familiar structure for handling CX on a day-to-day basis, no cultural change (or quantified outcomes) will come of it.



The true power of CX lies in the ability to bring it all together: customer and employee feedback, continuous dialogue, daily action, recognition and best-in-class technology. When all these cylinders fire together, you can crack the code of CX culture change. When the whole organization starts to see CX as more than a number, transformational changes in how you do business will quickly follow.



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