



Executive Brief

Virtual Case History on Designing and Implementing the Digital CX Journey: Hyper-Targeting CX Strategy Using Customer Data

**Moderated by Rich Wilson, Director of Customer Experience & Design Thinking,
Kimberly-Clark Professional**

Abstract

The days of “fluffy” CX are over. New tools and new ways of thinking allow fully resourced CX teams to not only identify moments that matter, but also the cost to the organization.

Key Take-Aways:

- Insight on which tools, skills and disciplines you’ll need to prioritize and quantify your next CX strategy
- An understanding of how combining survey results with business data can quantify specific experiences

Rich Wilson opened the Virtual Case History by noting that he worked for the B2B industrial arm of Kimberly-Clark. He shared that, like many other organizations, the customer experience (CX) department was established just two years ago. He is currently focused on how to improve and add value to the customer experience and obtaining funding for initiatives that support that cause.

An informal poll of the attending members revealed that many were also trying to build out relatively new CX departments and were seeking ways to get funding or additional funding. A few did have clear funding sources and endorsed “failing fast,” albeit while committing to ongoing testing and exploring new ideas and initiatives. One member commented that it was always helpful to get the sales team on board or present a burning issue to leadership when seeking a budget.

According to a recent survey, **87% of executives say that an exceptional customer experience is very important or extremely important to their organization.** Yet, it is very difficult to get executives to “invest in (customer) experiences” that don’t show a clear ROI. How to resolve this problem and assign a value to the CX? To help focus efforts, it’s helpful to identify key customer issues and designate relative importance. Rich underscored the fact that most organizations know there are CX challenges, but have a hard time identifying and working from the right insights. Effectively using metrics to identify telling data is critical, and assigning a hierarchy of importance for resource focus is also important. For example, deeper data analysis may show that there are customer service and delivery issues, as opposed to selection or price issues.

Tools to help determine where to focus your CX strategy include:

- **Journey mapping:** Many participants shared that they were doing this. Rich reminded all to be sure the journey map is customer focused, not organization-focused
- **Relationship surveys:** A one-time survey and the focus of the presentation, many of the participants indicated that they were using relationship surveys
- **Transactional surveys:** These surveys examine the experience a customer has had within a particular transaction or interaction
- **Service blueprints:** A newer approach; sometimes described as a variation on process mapping

Surveys and Scoring

Rich endorsed the value of Customer Relationship Surveys and discussed process. These surveys are typically given to big customers and are used to take the pulse of the customer relationship, i.e., what's going right, what's going wrong, and what the key customer drivers are. The Customer Engagement Score, or CES, is emerging as an important way to measure B2B interactions. It is typically based around asking customers how easy or hard they find it to work with a particular company and other related questions.

Rich discussed how to determine value of customer sentiment, including how to move scores from negative to neutral or positive. He noted that a positive response or sentiment is usually tied to more revenue. According to data shared in the presentation:

- Customers with "poor" annual relationship survey scores are correlated with an average spend of \$3 million less than customers with "neutral" scores
- Customers with "neutral" annual relationship survey scores are correlated with an average spend of \$1 million less than customers with "positive" scores

Refining results with regression analysis

Rich recommended using regression analysis to break up general customer problems areas into more specific, manageable areas of focus. In the example he shared, diving deeper into the customer issue by examining operations metrics related to it was a follow-up step. For instance, if a customer selected "Deliveries" as a poor overall experience, delving into the operational issues of "missed delivery window" or "damaged" or "wrong product" would probably provide more specific, actionable feedback. This scenario was discussed in the Virtual Case History. The value of taking one customer action or response at a time and analyzing it was also discussed.

Choosing the right type of survey to get to the appropriate sentiment scores was another area of analysis. For instance, a Customer Satisfaction (CSAT) Survey is often used for assessing consumer product interactions. It was noted that Net Promoter Scores (NPS) are becoming a less popular tool. On a related note, all agreed that online customer behaviors are harder to assess and track, especially as many customers now start the buying process online and then move offline, creating greater complexity.

Rich shared some of the "skills required to win" when creating and tracking the customer experience. These include:

- A strong sense of curiosity
- The ability to pivot when data doesn't cooperate or support your hypothesis
- Good, basic data analysis – with the cleanest data possible

- Professional research, including regression analysis

In closing, Rich encouraged CX practitioners to work at “identifying the moments that matter most” to customers on their journey and to examine them closely. Not surprisingly, he advised CX leaders to create a post-purchase relationship survey to validate their customer experience theories with data.

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