



Customer Experience Optimization



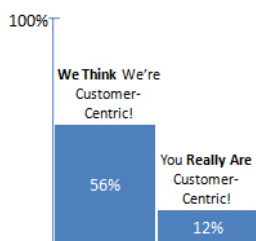
Differentiation through Customer Experience Optimization

ClearAction customized consulting and mentoring services

Customer Centricity Goes Beyond CX Management

While 56% of managers think they're customer-centric, only 12% of their customers agree.

81% of companies with strong capabilities and competencies for delivering customer experience excellence are outperforming their competition.



Aligning Business to Customer Preferences

To differentiate customer experience, do something your competitors aren't doing in customer experience management. Re-examine how you're listening to customers, viewing customers' expectations, and focusing your employees and business rituals on customers.

ClearAction is a customer experience optimization consulting firm that guides company-wide action on a clear view of customer intelligence. Customer experience optimization goes beyond the revenue-focus of customer experience management, to grow both revenue and profit naturally through company-wide alignment with buyer priorities.

ClearAction's depth of practitioner experience since 1989:

- Inspires employees to take the customer perspective — know your customers' world better than competitors do.
- Instills customer-focused decision-making as a habit among all employees — motivate customer experience optimization as a way of life.
- Engages employees to resolve and prevent customers' issues — collaborate cross-organizationally for company-wide customer experience excellence.

"ClearAction has taught us things that would not readily cross our minds; they make total sense, and have increased our efficiency and accuracy in many areas."

— K. van Diepen, Director of Marketing

Customer experience optimization (CXO) differs from traditional approaches to customer experience management (CEM) by balancing *revenue-focused* customer touch-point excellence with *profit-focused*, company-wide operational alignment to what matters to customers.

What matters to customers is defined primarily by *customer-initiated*, rather than company-initiated inputs; most customers will readily share extensive feedback if they are asked in a way that matches their preferences, rather than the way the service provider company thinks they should collect feedback.

Customers make paychecks and budgets possible, and shareholders leave when customers leave — not the other way around. Hence, profits as the purpose of a business is a misnomer — every organization, and every job, exists to serve a customer need — and profits are a necessary and desirable byproduct of meeting those needs both effectively and efficiently.

Therefore, CXO positions customer experience inputs as *determinants*, rather than a subset of corporate strategy. To do this, the nature of customer experience (CX) inputs must support information needs of the strategic planning process as well as key responsibilities of each functional area, such as hiring, training, recognition, incentives, reviews and promotion of people; policies, billing, reporting, and investing of finances; and similarly, the various components integral to IT, safety, quality, manufacturing, engineering, service, and so forth. *Employee engagement and accountability* for action-plan follow-through company-wide are also essential to CXO.

- *Customer Experience* includes all of the steps a buyer takes to get and use a solution from the time of the buyer's realization of a need until the buyer deems the need no longer exists.
- *Customer Experience Management* is a composite of customer management efforts (CRM, VoC, UX, service, loyalty, advocacy, references, touch-points, etc.).

Statistics from CMO Council Customer Affinity study and Peppers & Rogers Customer Experience Maturity Monitor study.

Customer experience management is necessary, yet insufficient.

Leapfrog your competitors through customer experience optimization.

ClearAction provides customer experience optimization (CXO) mentoring, training, and customized services.

Customer Experience Optimization is company-wide alignment with buyer priorities to grow both revenue and profit naturally. Align to buyer priorities by 1) taking the customer perspective, 2) making customer-focused decision-making a habit, and 3) resolving and preventing issues for customers cross-organizationally.



1) Inspire employees to take the customer perspective. Know your customers' world better than your competitors do.

Customer Experience Management
Mindset:

- How the company is doing
- How the company can increase revenue

Typical Tools:

- Surveys, listening posts
- Advisory boards, user groups
- Positive word-of-mouth, promoters
- Social media, communities
- References, buyer personae

Customer Experience Optimization

- What the customer is doing & why
- How the company can contribute to well-being

- Text mining, voice mining, data integration
- Complaints, cost-benefit perceptions
- 360-degree view of customers' world
- Jobs-to-be-done segmentation
- Customer experience personae



2) Instill customer-focused decision-making as a habit among all employees. Motivate CXO as a way of life.

Customer Experience Management
Mindset:

- What customer-facing employees should do
- How the company can increase revenue

Typical Tools:

- Key drivers of customer perceptions
- Touch-point improvement
- Customer journey maps
- Front-line training
- Customer loyalty management

Customer Experience Optimization

- What all employees should do
- How the company can increase profit

- Customer-focused roles & competencies
- Customer-focused individual & organizational reviews
- Customer-focus training company-wide
- Customer-focused motivation & incentives
- Self-awareness of stakeholder perceptions



3) Engage employees to resolve and prevent issues for customers. Collaborate cross-organizationally for CX excellence.

Customer Experience Management
Mindset:

- Resolving issues at touch-points
- How the company can increase revenue

Typical Tools:

- Closed-loop survey responses
- Customer loyalty programs
- Brand advocacy
- CRM technology
- Personalized marketing

Customer Experience Optimization

- Preventing issues for all buyers
- How the company & customers can mutually increase value

- Closed-loop systemic issues
- Cross-functional collaboration to transform CX
- Ongoing adaptation of company to customers
- Customer experience informs all strategies
- Pre- and post-purchase CX innovations

Customer experience management is necessary, yet insufficient.

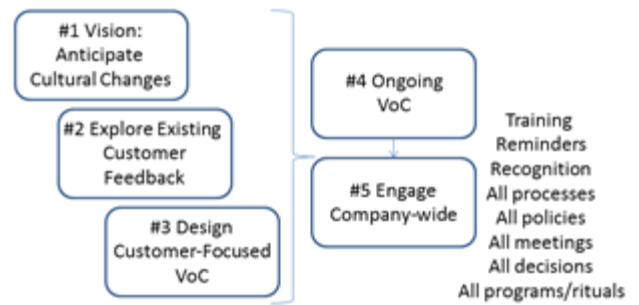
Customer experience optimization efforts can work in lieu of or in concert with customer experience management efforts.

Note: ClearAction does not provide survey management or technology solutions. Our work seamlessly augments your existing customer experience efforts and/or helps you navigate your options to create a methodology that best fits your customers.

To differentiate customer experience, do something your competitors aren't doing.

Re-examine how you're listening to customers, viewing customers' expectations, and focusing employees and business on customers.

To optimize customer experience, you may elect to pursue the following best-practice building blocks to engage employees company-wide in customer-focus and customer experience excellence. *This approach acknowledges and leverages your existing customer-centricity data and methods, and expedites noticeable changes in customers' experience.*



(1) Articulate a clear vision:

- Executive sponsorship is #1 key to success.
- Unclear CX strategy is a common obstacle, according to many recent benchmarking studies.
- Formulate success factors for company-wide engagement needed to differentiate the customer experience sufficiently to reap market share and profit gains.

(2) Assimilate the what, why, and how of customer-initiated inputs/feedback:

- Identify “low-hanging fruit” for immediate improvements.
- Act on what customers have already shared before asking for more feedback.
- Collect guidance for the design/revision of voice-of-the-customer feedback (i.e. ongoing VoC).

(3) Design a voice of the customer (VoC) program that truly fits your customers:

- Capitalize on places/times/methods that customers feel most compelled to share their perceptions.
- Combine all input sources for a comprehensive view of customers company-wide.

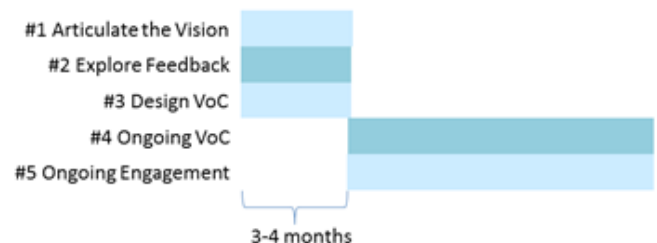
(4) Collect customer inputs on an ongoing basis.

- Allow customers to provide feedback how and when they prefer.
- Focus on what customers are pursuing in the larger context of acquiring and using your offering.
- Translate customer inputs into business management language for use in all strategies, policies, processes.
- Avoid the temptation to jump into this step prematurely: first, explore what really fits your customers.

(5) Engage employees company-wide in customer-focus and customer experience excellence:

- Align skills of all employees according to needs identified in #1-4 above.
- Weave customer-focus into all processes, policies, meetings, decisions, programs and rituals.
- Make customer-focus a way of life in daily communications, recognition, incentives, etc.
- Innovate customer experience excellence on multiple dimensions to clearly differentiate your company.

Steps 1-3 may occur simultaneously, utilizing the tools, data and energy already available within your company. During steps 1-3, employees may begin using new techniques to generate *systemic* solutions to customers' most obvious pain points. Steps 4 and 5 occur in perpetuity.



Create a roadmap for customer experience optimization.

A clear customer experience optimization strategy is the first step to increasing business results.



Plan in advance who will do what and when – company-wide. Let your boldness reflect your insight that customer experience differentiation is crucial to your future. Expect everyone to understand their snowball-effect on customers, and to be accountable for continual improvement, prevention of issues, and customer experience innovations.

Optimize customer experience with guidance from an experienced practitioner.

Maximize morale and accelerate business results by preventing mis-steps and leveraging best-practices.

Lynn Hunsaker, Head of ClearAction

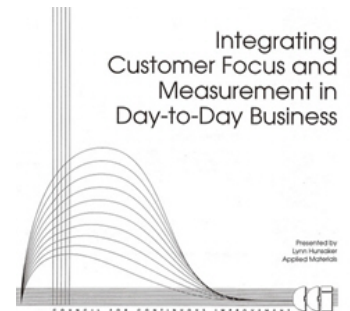
Lynn Hunsaker is founder and president of ClearAction customer experience optimization consulting. She has developed and managed customer experience programs at Fortune 250 companies in roles such as Head of Corporate Quality, Director of Marketing and Business Development, Voice of the Customer Manager, Market Research Consultant, Strategic Information Manager, and Customer Satisfaction Improvement Manager.

ClearAction clients include Accountants Inc, Adecco, Anritsu, Applied Materials, Cadence, Cisco, Deltek, Direct General Insurance, FormFactor, Hospira, Ingersoll Rand, Merck, MicroWarehouse, SunPower, Thomson Reuters, Valin, Whataburger, Zenprise and others.



Extensive Practitioner Experience

At Sonoco, Lynn led a taskforce to develop a 20-country multi-division customer satisfaction survey methodology in 1991, improved multi-year survey efficiency by 50%, and conducted hundreds of personal interviews at customer sites as inputs to the annual strategic planning process. Starting in 1994 at Applied Materials, Lynn conducted customer experience action planning workshops with 50 business units and deployed extensive internal branding to engage employees company-wide in owning the customer experience. She also designed and conducted focus groups and customer feedback instruments for marketing, service, product development, and operations.



ClearAction is a Founding Corporate Member of the Customer Experience Professionals Association. Lynn is one of ten CXPA Customer Experience Experts, volunteering advice to members' questions. She has participated on the Education committee and moderated a B2B CEM discussion at the Members' Insight Exchange, and Lynn has contributed three CX Tools to the CXPA:

- Customer Complaint Management to Maximize CEM ROI
- Voice of the Customer Action Plans Focusing on Leading Indicators
- Calculate Your Organization's Customer-Centricity



Lynn founded the Annual ClearAction Business-to-Business Customer Experience Management Best Practices Study in 2010. She has been a CustomerThink top-10 customer experience author, and she has been a board member of The Customer Care Network, CustomerThink, and Marketing Operations Partners. She is past-president of the Bay Area chapter of Association for Psychological Type and Silicon Valley chapter of American Marketing Association. Lynn is a Certified Professional Marketer (AMA), Certified Quality Manager (ASQ), and Certified MBTI® Practitioner (CPP). She taught advertising, marketing and business courses at UC Berkeley Extension, SJSU, and Mission College. She earned psychology and marketing degrees from BYU, and her MBA degree from Vanderbilt University.

Lynn Hunsaker has written and published three handbooks:

- *Customer Experience Improvement Momentum*
- *Metrics You Can Manage For Success*
- *Innovating Superior Customer Experience*



ClearAction's network of virtual teammates meets your needs economically.

ClearAction customer experience optimization consulting guides company-wide action on a clear view of customer intelligence.



ClearAction offers mentoring, train-the-trainer and offsite/onsite consulting in these topics:



Customer-Aligned Perspectives

Inspire employees to take the customer perspective.

- What the customer is doing & why
- How the company can contribute to well-being
- Customer Data Integration
- Systematic Complaint Resolution
- Customer Value Quotients
- Customer World Perspective
- Customer Experience Personas
- Customer Experience Coaching
- Customer Program Review



Customer-Aligned Decisions

Instill customer-focused decision-making as a habit.

- What all employees should do
- How the company can increase profit
- Customer Experience Value
- Customer Experience Excellence Vision
- Nurture Executive Sponsorship
- Holistic Decision-Making
- Internal Branding
- Customer Stories
- Speak Stakeholders' Language
- Stakeholder Engagement
- Customer-Focused Roles
- Customer-Focused Reviews
- Customer-Focused Behavior
- Customer-Focused Motivation
- Customer-Focus Incentive Strategies



Customer-Aligned Actions

Engage employees to resolve & prevent issues for customers.

- Preventing issues for all buyers
- How value can be mutually increased
- Systemic Voice-of-Customer Action Plans
- Touch-point Value Chains
- Internal Customer Deliverables
- Customer Experience Champions
- Customer Experience Governance
- Cross-Organizational Collaboration
- Self-Reporting Team Recognition
- Customer Experience Innovation
- Use Voice-of-Customer in Strategic Plans
- Process Maturity Ratings
- Leading/Lagging Indicators
- Act on Multiple Voices
- Multiple Functions in B2B Journey
- B2B Post-Purchase Touch-points

Customer Relationship Skills Training

- The Power of Listening
- The Power of Questions
- The Power of Intended Outcomes
- Balancing Open Dialog
- Interaction Bridges™
- Personalities Under Stress
- Building Trust
- Partnering Roles
- Sources of Influence
- Building Client Relationships
- Stakeholder Management
- Building Relationships with Each Buying Influence
- Creating Value through Systems Thinking
- Learning from Challenges & Successes
- Mastering Implementation