

 Collaboration Network

The  CX Lounge

Discussion Group Series Report



“How do we embed customer centric measures into habits and objectives?”



Discussion Group Report: 10th May 2022

Guest Chair: Rebecca Brooks-Daw, Senior Customer Experience Strategy Manager at AXA Health

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*(This report provides an abstract overview of the topic, and, although it is written in a standardised format, it covers all aspects of the question in a lot of depth)*

### **The question posed by the chair was:**

How do you embed customer centric measures into habits and objectives?

### **To provide further context towards the scope of the question, the Chair included the below sup-pointers**

- How do you get CX measures into all customer facing team's objectives?
- How do you get top-down approval for CX activities that don't drive cost reduction or revenue benefits in the short term?
- What communication tools and channels have been most successful for internal engagement
- Have you ever tried reward-based systems (other than commission) to encourage customer centric thinking, and if so, what has been most successful? What Governance structure/ activities have been most successful in generating action and success?

### **Notes from the session**

The guest chair kicked off the CX lounge by providing case study material, articulating on the progress of their newly established CX programme. Seeking the groups council, the chair pushed the need for ideas linked to customer centric thinking, before implementing their new programme. Likewise, the structure of the decision-making process resonated with this, implying a bottom-up approach, a level of autonomy positioned in customer facing roles. Furthermore, one participant looked at the benefits linked to outcomes and behaviours that are focused on failure and demand. In contrast, they believed it to be a very dynamic process, with the overall decision making or consequence based on senior response, challenging the final assumption. The speaker had a strong view, they stated that, "if it practically doesn't fail to improve cost margins, then it is a renowned success"... "but it won't be in the single interest of the board". But, and on the other hand, the speaker argued that there are ways of being sustained in this process which is also linked to success, and it is centred around bringing the team along, working closely with senior colleagues at all possible opportunities.

In similarity, another speaker stated how previously, 'the wins' linked to CX intervention were centred around profitability margins, as well as outcomes in technological advancement and increase in omni-channel presence, Whereby, cost reduction techniques were in place, with measures embedded to achieve an increase in acquisition and gain revenue. The idea that the structure breaks when a senior is 'putting their own stamp on it', following a tail end 'top-down approach'.

To provide an example of a success benefiting from raising CX measures, one participant provided evidence of their existing 'customer voice programme', established under a systemic approach. The speaker implied that it had been fully embedded because their key measurements and outcomes considered and aligned with all areas of service expertise, all the way down to a local level. In addition, the reporting board was heavily influenced by the customer orientated strategy, as they used resources efficiently and considered all aspects



of digital transformation. They opened new avenues for their organizations IT software infrastructure at the same time. Other types of implications included call times not being monitored, instead, targets were being tailored around 'people performance', suggesting a human dynamic impacting this shift in mindset towards CX.

Touching on their colleague's point, another member of the organisation addressed the more convenient operational elements. The speaker stated how they had worked hard as a business with front-line teams in smaller pockets, or so called 'micro-climates', assessing failure and demand by producing feedback to help them build on these CX ideas and doing this in a systemic manner. Therefore, they were able to listen to the thoughts and feedback of front line staff. Giving them a level of power and autonomy, putting ideas forward, challenging these processes and nurturing change. The speaker also reflected on the concept of digital transformation, whereby they had developed software to track and label calls, but they also expressed the need to undertake some processes 'the old fashion way'. They assumed that the simplicity of having a underlining tick sheet to underpin data, would enhance a 'smooth progressive' customer journey. The speaker concluded on how the systemic approach provided a way of engaging from the offset linked to the collaboration between all stakeholder parties.

Alternatively, one speaker described the process of selecting successful CX measures to of been a bit "chicken and egg" (hit and miss). The participant had reiterated the importance of "hitting tick boxes from the get-go", but to spend a lot of time understanding customers, to know what it is that needs to be removed from the process. The speaker reflected on the importance of data gathering, understanding data sets in what this tells an organization, and over being too invested with the proposition of it. Therefore, they underlined how far customer centric businesses go in transforming habits. The speaker had urged the group that by building on touch-points, setting aside what channels work from what ones don't work, it formulates the journey into a positive experience. Overall, the speaker felt that, by ticking the box as you go, the board members who are focused on retention and profitability, are, in actual fact, consisting with these views.

Another participant agreed that it is also 'chicken and egg', when perfecting CX measures that come from the right data metrics. They encouraged others to use traditional metrics, as a way of staying smart and tidy when capturing feedback. The speaker evaluated how call handling times had marginally increased on average, therefore, they felt it had become a complex process, but, on the flip-side, it is more likely to be a positive experience for the customer. If the call is more resolute, then there should be less complaints on average with less pressured staff, having a positive impact on client outcomes. Ultimately this is dependent on the culture and leadership of any organisation, with the storytelling concept based on how they choose to analyse the 'pros from the cons', and as part of the feedback loop.

During the session, one of the earlier speakers ensured the group that... "There are ways of measuring your call volume analysis to enhance these metrics.", Specifically, "ways that comply with GDPR regulations and tackle Quality Assurance Checks". By framing questions in a simple way, employees can range calls from A) Good, B) Mediocre & C) Bad. The speaker highlighted a powerful tool that can be integrated into any team hub in gaining accurate feedback. In this case, they shared the "everything was fine but...", a natural answer to a QC call, before listing all the negatives from the positives. They find that normally there are levelled comparisons, the 9/10 enthusiastic promoters, from the 6/10 dissatisfied detractors. However, the speaker, argued that respondents normally take a very passive approach (in-between) and are usually satisfied with the service experience.

One speaker suggested moving away from Key Performance Indicators (KPI's), arguing that they dominate and have a large impact on any culture or mindset shift. Especially for leadership communities within large



scale enterprises. The speaker provided case evidence of a previous campaign, the challenge was to consider CX outcomes vs. KPI's – therefore, and once again, a way of promoting front-line autonomy. They stated how they introduced 'customer missions', setting up 'CX squads' to investigate each specific area linked to a CX outcome, alternatively, each 'mission'. Overall, this structure allowed organizational leaders to listen to the voice of their customer, resolving any first-time queries. The speaker, then provided evidence of a response to customer behaviour. The removal of Average Handling Times (AHT's); an example of an efficiency metric, a common KPI for call centres. Generally, the direct contact between the senior team and each of the CX squads, illustrated a two-way feedback loop, providing strength and power to the customer, shifting from these internal KPI measures. In response to this, the chair agreed that there is a commonality to remove the use of AHT's due to the evolving nature of the service model. But, there was an overarching view around the concept of empowerment, whereby, customer facing teams could define their own measures, within these smaller pockets.

They also raised the importance of making CX a core objective. But by doing this, "you are making the space for CX handling efforts, protecting it by scheduling it over other events which are more commercially renowned". Therefore, the speaker feels that in industry practice staff will adapt to these learning exercises in areas such as overflow calls, call collaborators and blockers in order to acknowledge the wins. But also making it a safer space if it is imposed or agreed by the leadership community.

An expert subject provided case evidence from a past organization, they described 'the leavers you pull around' answering down to what concepts are measured at the top level, specifically when leading CX change. They observed the work of a new CEO who had joined the organization, who immediately reinforced the company's strategic document, configuring each unit of the operating silo, and condensing the strategy down into a single page document. They explained that when re-configured, condensed and directly promoted into all team spaces, it envisioned the workforce which allowed them to go in a certain direction. One speaker also agreed with the simplicity of the strategic document, they felt that it would drive a better outcome "taking the label off it". The expert had raised the point about repositioning data in consumer language, for it to be a powerful tool. For example, how 'call wait time', is tracked and reported linked to the vocabulary used to define it. The expert describes this activity to be a journey in data, therefore, and again, it answers down to what organizations consider measuring, to target themselves on. The chair also responded, they agreed that the concept provided further thought on how it can individual thinking, specifically around a time considering the home measures of front line staff, transcending with the modern hybrid model (working from home). The expert speaker responded, they felt it was based on how well the organisation answered down to the strategy when considering how a percentage of there audience are now working off-site.

In comparison, one expert speaker argues that systems can cause staff to feel distant. The misuse of technical terminology is a side effect, that can provide a challenge to organisations and their adoption of their objectives. The chair responded to this, they raised the importance of the fluidity in the matter, prioritising what works well at the customer end rather than at the business end. And, therefore, that should lye in the interests of the business.

One participant from the water industry raised the point on how the correct software implementation would relate back to the scoring good feedback. They captured the importance of gaining real time CX feedback/information. And how some organisations have received bad connotations linked to a 'middle age' perception of their CX being out of touch in the past. Within their own organisation, the software they had implemented, received a 'fantastic' set of engagement responses, because the tool captured rich data, making it fully customer centric: A) Being able to handle specific complaints, and, B) leaving minimal margin for error. As a result, the software was carried out to administer scoreboards and be used for internal targets for staff competition on



a daily occurrence. Overall, this signified how a deliverable software provided an in-house gaming aspect. The speaker also elaborated on the success of the software implementation, with it going company wide, introducing components to their insurance team and other segments of the business.

The chair responded, showing interest with how the platform provided a competitive touch, motivating front line staff. But also, how the concept helped to influence individuals further down the line, with the possibility of introducing a coaching aspect and to monitor future development. In addition, the previous speaker, defined the competitive process at their organization, based on there being three overall top performers (non-derogatory) from all the different types of calls being handled. And that the business had started to implement a coaching and support structure, to ideally separate the good calls from the bad ones. In addition, the speaker implied how messaging channels were also 'handy' to communicate support, with internal group chats/ functions set up to handle complaint issues. They found these group efforts signified dedication towards growth, offering real time support, which enhanced customer perception.

Moving on, one speaker highlighted the topic of reward. They argued that outcomes and initiatives can sometimes be used for the 'sake of it', reflecting the day job, not the long-term outcome, and therefore, they considered it to be a form of experimentation. The chair also agreed, commenting on the openness of the conversation, they suggested that there are other ways of signifying reward and recognition, rather than being of monetary based value. The participant went on to define this idea of pride, to "wear your badge" and be an all-round figurehead for the organisation, as well as, for your community. This concept stemmed around the quality of training, which coerced with the less defined, regulated companies, where their principles define key elements towards understanding their CX measures. The speaker advertised tips on how staff can make the CX solution seem more personal, they encouraged the use of notepads as a mental checklist, but also how the use of having access to these common 'low-tech systems' e.g., WordPad can really stand out, to ensure they are collecting the data and evidence 'word for word'.

One participant drew attention to their 'Go the Extra Mile' initiative. This campaign originated just from talking with staff. The speaker described this to be a way of getting people on board, but to also embed this into their HR & Recruitment plan when searching for potential employees that they believe, would be able to take on this initiative. The speaker discussed the fact they worked with external trainers to embed this scheme into their performance strategy. One participant acknowledged this, citing the importance of 'inclusive service designs', which are human centred, but can also be assembled digitally and can identify the scope of the problem for any stakeholder within the organisation. However, when questioned on the timeline and length of completing an inclusive design, the expert stated that it is down to the amount of commitment and choice of front-line team/ advisors, HR and strategists involved in the tactics. They looked at this collectively, with the phrase... "How it is done 'with' not 'to'... suggesting the nature of CX, defined by customer centric progression, instead of this idea about how it is centred around perfection.

With the topic of conversation evolved around strategy talk, one participant considered their own work looking at it from a collective perspective. This was based on each person playing a part in reforming the change, looking at what they had hoped to achieve. The participant provided examples of how their front-line team maintained frequent discussions with their operational team, putting ideas forward on what concepts worked and what ones didn't work. The idea to keep strategy talks simple and concise. This provided front-line staff with the ability to decipher change, and control organisational development, in which case, shaping out the failure from demand.

The chair intervened, implying that in some cases, too many strategic decks can be in place, therefore, it becomes an overall complicated process for the business when choosing to rationalise. And, to add to this the



host commented on this idea of how “strategy leads into strategy”, questioning this thought... “do individuals really get involved in approach or is CX more management delivered?” The chair then answered to this, suggesting CX is more management orientated, however strategy teams and specialist areas do play a part in setting out these objectives. Therefore, a mix of different stakeholders forming the strategy can lead to “too many chiefs with a desire to change strategy somewhere up the pipeline”. Within the lounge session, the host suggests, that although it is the case how leaders tend to ‘pull a plug on it’, it is a team contribution. Therefore, if everybody is focused and in touch then they are most likely going to be able to facilitate and deliver their objectives, aligning it with their strategy.

One speaker argued that whatever project, system, or change is coming, it is often the vocal people that are seen as the key assets. Therefore, getting them on-board is decisive part towards raising the initiative. They argued the need for vocal or resistant people to be on the practitioners side, with consistency through involvement, highlighting this idea of a ‘ripple effect’. Overall, “these practitioners and advisors have embedded their own language and they have the power to sustain and inflict change”, again, this puts emphasis on the word ‘with’ rather than ‘at’.

One of the earlier participants, revisited communication, and engagement tools. They stated that it’s about getting out of old metric habits, allowing case handlers to help customers, driving better outcomes. However, one participant argued that staff can get carried away with these objectives, which, in hindsight, endangers their own customers, if people’s voices can’t be heard. They described this to be a form of de-personalization. The participant pinpoints the fact that they train staff to recognise human beings on the other line. And, therefore, not get carried away with hitting QC targets and call handling objectives, as these people share feelings, therefore, it is a moral standpoint, recognizing vulnerability status and acknowledging consumer feedback with the morality around the importance of putting faces to names rather than to metrics.

The guest chair revisited traditional metrics, understanding how they can be scary for customer facing colleagues, but key in creating space to shift in style, therefore producing the outcomes, the wins. They suggested moving from outcome wins to approval for customer activity in the short term, as it is a cost-effective approach, but more importantly the speaker felt that it helps to build a business case and encourage this feeling of ‘bravery’ towards finding an ‘indecisive outcome’ (however long it takes and as much as it costs).

One of the earlier participants responded to the investment of time into the strategic plan. They explained there understanding of the current context, an emphasis on storytelling, where users must be ‘brave’ as an initiative that can go two ways. Though it is important to prevent past mistakes. This withholding view that it is up to the organization to invest their time and people into researching their customer vulnerability and complaint handling data, resonates with examples of best practice, and on the other hand, identifying this idea around ‘short term gain vs. long term pain’.

The chair reviewed cost base, and how it should be more controlled post pandemic, otherwise there is this idea of a ‘knock on effect’. One speaker agreed, going to the extent of how organizations should be closer to customers, when interpreting a future crisis, and thus, they are always prepared and proactive. Shortly after this, the expert speaker referred to ‘service prototyping’, identifying problems and solutions which are labour intensive and battle a long-term contingent crisis. Considering any type of troubled event, but they advised how “the process should always improve, therefore, improvement should always win”. If they aren’t winning commercially, then it is possibly the wrong problem or solution finding answer. Another speaker stated how prototyping is exciting for key stakeholders with less risk and can also be backed up by any form of data. Therefore, assessing values of leaders, who act from experience. The speaker also referred to ‘network opportunities’ to help fix issues, and in trusting what others have said.



In continuing with this research theme, one speaker addressed the importance of the upfront narrative. The perspective that challenging and battling to improve CX will not immediately hit ROI, but it will mean you are consistent and can demonstrate strong beliefs linked to storytelling, and so, “you are achieving what you set out to do”. The speaker described this to be a very agile outtake, reiterating that “you should be ‘brave’ when actively challenging to look for CX outcomes”. One speaker focused on the agile approach. This idea that you are to be less upfront in the project approach (costs/ benefits/ strategy) and instead, being much more fluid and test based in collecting results. Examples included... A) Introducing sprints to measure and reflect on a short-term basis, B) Already having condensed Governance frameworks to explore agile movement, with the ability to tweak areas, C) Being able to control the narrative, and provide evidence, to get buyers in. The speaker insisted that to fulfil these requirements, there needs to be a lot of control groups, prepared to roll out the change, as well as support functions ready to aid the change. On top of this, a participant argued that the structure needs to be flexible and robust linked to ‘New Age Governance’, and so, a lot of upfront work will help organisations linked to the synergy working with operations teams on CX measures.

On the topic of ‘Governance’ specifically, the ‘Governance Structure’, the last speaker within the session, examined how there had been poor examples of these toolkits in the past. They alluded to the good examples “having a quicker route of adoption, and being less stuffy”, therefore, it will work well if its easy (the document isn’t passive or too formal). But, on the other hand, if governance as a separate function is too passive or too informal, then there is this view that participant is less likely to check out, idealizing this being the key to sharing output, “the difference people are making”.

Afterwards, the trail of the conversation lead the chair to ask the group, “how do you measure the progress being made against solutions on an upfront basis?”

The previous speaker argued how it is down to the front-line teams to assess short term impact, via regular upfront conversations. Nevertheless, any organization would require a competent team, a group of ‘champions’ to capture the group activity. And therefore, formulate the change which in itself will become second nature to them. The last answer to this is evolved around the language, people speaking the same CX vocabulary, in establishing customer centric measures.

### Topics raised

Finally, the guest chair concluded the CX lounge, elaborating on topics raised from the discussion, and how they could be taken on-board and embedded into their own organization.

*Some of these concepts included...*

- Customer language, outcomes and storytelling
- Systemic approach
- Strategic policy deployed on one local level, therefore less strategic viewpoints being implemented
- Experiencing different types of call feedback linked to the CX journey (E.g. good/ mediocre/ bad)
- ‘Inclusive service design’ - blends in with all users (employees, leaders, and customers)
- The theme of Governance, having a reliable structure to comply with

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