b2bmarketing.net

B2B Marketing

Insight · Development · Training · Events

Transform into a CX champion



Contents

Introduction	3
Section 1 When there's no existing organisational-wide CX programme	6
Section 2 When there's no overall owner of the CX programme	8
Section 3 Taking responsibility for the entire customer lifecycle	11
Section 4 How to map the customer journey	13
Section 5 How to drive employee engagement	15
Section 6 How can you measure the success of your ownership?	17
About B2B Marketing	19

Introduction

Customer experience is a group-wide effort. You can't set up and run a CX programme internally on your own. It'll take support from the very top, collective will, and an engaged workforce.

To make this happen, CX needs a champion, conductor, coach, collaborator, salesperson and publicist inside the organisation who's not afraid to get their hands dirty.

That's where you come in. A survey by Marketo found 86% of marketing leaders believe they will own the end-to-end customer experience by 2020.

Whether it's a responsibility you've been looking for, or one you've been handed, this guide, and our model will show you how.

In this guide, you'll discover how to:

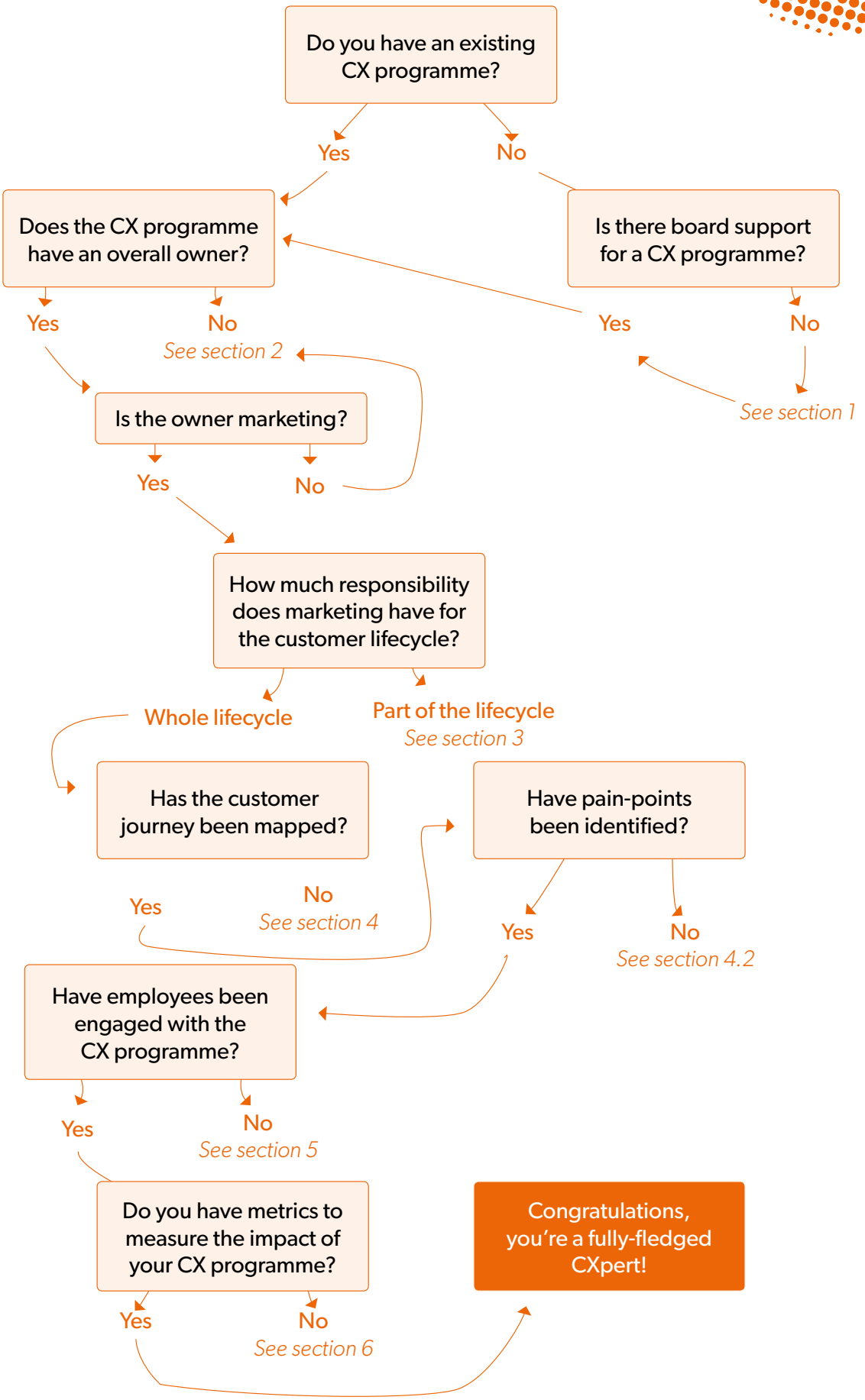
- Gain the support of senior stakeholders.
- Expand marketing's remit to oversee company-wide CX.
- Get closer to customers and their insights.
- Map the customer journey and address pain-points.
- Engage employees at all levels in the organisation.
- Measure the success of your ownership.

How to use this guide

We've produced the following flowchart that traces the journey to become a fully-fledged CXpert.

Follow the step-by-step process, and if you find yourself answering 'no' at any stage, turn to the indicated point in this guide to find practical actions and tips you can use that'll help move you to the next stage.

Find your way to become a CXpert



Before you get started…

Even the most passionate and dedicated CX enthusiast will struggle to overcome certain obstacles that inhibit customer experience improvement projects. Consider the following, as these circumstances may make it difficult for the marketer to effect change.

What are the organisation's corporate objectives?

If your business is sales-focused or product-focused, it may be impossible to transform it into a customer-focused business, because those goals will always take precedence over the needs of the customer.

The best CX leaders – think of Amazon and Slack – were built from the ground-up as customer-centric businesses. It's part of their DNA. This isn't to say you can't improve CX within sales-focused or product-centric firms, but your efforts will be better spent tackling small improvements to customer journeys than trying to implement whole-scale change.

What is the organisation's structure?

The majority of businesses are set up in functions. This inhibits CX because it encourages independent, siloed activity rather than the cross-functional approach required to address the customer lifecycle. The most powerful CMO (or even the CEO) won't have the capability to fundamentally re-organise the corporate set-up.

Breaking down siloes is key to successful CX implementation, but how entrenched these invisible walls are in your organisation will be a big determinant in your success.



What is marketing's profile within the organisation?

Taking responsibility for CX has the potential to raise marketing's profile within the organisation. However, due to its dependence on a close relationship with senior leadership and stakeholders, if you don't already have their ear, persuading them will be even more difficult.

Section 1

When there's no existing organisation-wide CX programme

The first question to ask is 'why not?'

Is it because it hasn't been attempted? Or has it been tried and run into difficulty? This distinction is important because it will affect the course of action you take to get one off the ground.

If it's not been tried you won't have to deal with negative preconceptions, but you'll need to educate senior management on the value it can bring. It'll also be crucial to get senior stakeholders on board if it's a second (or third) attempt, but arguments are more likely to focus on avoiding the errors of the past.



1.1 How to get senior leadership support

You cannot implement – let alone own – a CX programme without the support of senior management. It will fail because the endorsement of senior leadership is realistically the only lever that will force distinct functions to work together and give the project the impetus required across the organisation.

Even if marketing takes responsibility for the CX programme, you need the support of senior management to act as a figurehead and provide leadership and authority from the very top.

Before forming your arguments, take time to understand the motivations of senior leaders. Are there advocates for CX already on the board? The most common catalyst for the launch of a CX programme is a single, passionate individual – usually the CEO. Is this passion something that's likely to last, or just a passing fad? This will affect the programme's sustainability and success.

You'll need to motivate stakeholders by the right reasons, such as improved customer engagement and retention or long-term differentiation, rather than the wrong ones, which include trying to imitate a rival or paying lip service to the concept of customer-centricity.

A CX programme will require advocates who are prepared to think long-term, which could a bigger challenge in a quarterly-driven, sales-focused business. It takes guts and strong leadership to sacrifice short-term revenue at the expense of long-term improved CX.

1.2 How to convince senior leaders to back your CX programme

- **Sell the benefits:** There's plenty of evidence demonstrating how customer-focused businesses outperform their peers. Research by Watermark Consulting found CX leaders outperformed the rest of the S&P 500 over a six-year period, with returns three times higher than the rest of the index. Separately, KPMG found companies that deliver high-quality CX deliver revenue growth 54% higher than their competitors.

- **Show them the cost of doing nothing:** This was the approach financial software business Finastra took when making the case for a CX programme to the board. Lost customers, missing references and poor service meant the company had missed out on a potential three-million digit pipeline. A shock on that scale has the power to focus attention.

- **Tell the customer's story:** Storytelling is among the most powerful ways to make an impact and change opinions. The key is understanding what's likely to interest and move your audience. Do they want a tale that focuses on numbers? Or would they be swayed by examples of how the current set-up lets customers down? Identify the narrative that will win your argument.

- **Deliver an inspiring vision:** You need to provide a clear vision for the ideal customer experience and how employees will be able to deliver this consistently. This should include a roadmap of initiatives that deliver on this, alongside clear accountability for each of these.

- **Explain how it will work in practice:** Vision is one thing, execution is another. Be sure to lay out (but not in minute detail) exactly what the plan is for shared responsibility, performance measurement and employee engagement.



- **If all else fails, try shock therapy:** One marketing leader filmed some of their organisation's customers delivering an honest (and unflattering) appraisal of the brand's CX failings and shared it with senior managers. The strategy was unpopular – it was frowned upon to suggest that all was not rosy – but it did provide the impetus for change among senior management.

> *"A great customer experience pays off, paving the way for higher revenues, lower operating expenses and better overall financial performance"*
>
> **Jon Picoult, founder, Watermark Consulting**

Section 2

When there's no overall owner of the CX programme

According to B2B Marketing's Become a CXpert: the marketer's guide to leading a customer experience, nearly two fifths of organisations say there is a strong but siloed, and often conflicting, view of who owns CX in the organisation. Even when there is a nominated owner, there can be tension over who is really in charge.

2.1 When there is no current ownership of the CX programme

This is the opportunity for marketing to take responsibility. Marketing's relationship with the customer, repository of customer data and interaction with other functions within the business makes it well placed to co-ordinate group-wide efforts.

With senior leadership on board, you'll need to engage your peers in separate functions and employees within the organisation, giving them a unified purpose.

First, set out the goals for the programme. Do you aim to be a fully customer-centric business, with the customer's needs and desires at the heart of everything you do? Or do you have more immediate targets, such as boosting customer retention? Setting these out will clarify the purpose of the programme, and make it easier for others to coalesce around.

A way to encourage people to unite around these goals is through the creation of a CX charter. This outlines the purpose and mission of the CX programme, including the objectives. Getting colleagues and employees to sign up to it increases buy-in to the programme, and confirms the shared goals everyone is working towards.

Another method to boost recognition and early involvement is to treat the outset of your CX programme as a branding exercise. A strong brand will raise the programme's profile, build an emotional connection with stakeholders and provide something for advocates to rally around internally.

The three main objectives of your internal campaign should be to:

- Excite
- Educate
- Engage.



Customer-centric mission statements

The brand for your programme could include a mission statement. In a truly customer-centric business, this and the corporate mission statement will be one and the same. It can be used as a rallying call to remind employees to keep the customer front-of-mind. But – as with any mission statement – it needs to be followed by action.

"To be the Earth's most customer-centric company"
Amazon

"To improve our customer's financial lives so profoundly, they couldn't imagine going back to the old way"
Intuit QuickBooks

"To help our clients create such high levels of economic value that together we set new standards of excellence in our respective industries"
Bain & Company

"Marketing is often the first touch point for consumer interaction with a brand, so CMOs still hold the keys to customer experience. But CX still comes down to a collective effort from the whole company"

Tara Allison, marketing director at Trend Micro

2.1.1 How can marketing get closer to the customer

At a recent B2B Marketing roundtable, many senior leaders reported that marketing was unable to get as close to its customers as it wants. Primarily this is due to too many parts of the business demanding time with customers, or account managers wishing to limit contact with customers from other parts of the business. To overcome this, the marketing chiefs recommended a number of ways marketing could increase its touchpoints with customers:

- **Set up customer boards or focus groups**. These should be structured meetings with regular schedules, and formal agendas. You may have a number of groups concentrating on different customer segments, or stages of the customer journey.
- **Hold customer events or user forums**. A traditional approach in the tech industry, this brings customers together on a grand scale and gives the business the chance to explain its strategy and show off its developments.
- **Get involved in win/loss calls**. Whether your bid is successful or not, undertake a debrief call with the client to understand their experience. This is a rarely explored source of customer insights, and an area marketing can explore without stepping on the toes of other functions.

2.2 When there's already an overall owner of the CX programme

You'll need to develop a proposition around the support and expertise marketing can provide to the existing owner. This should be developed in line with who the owner actually is. A dedicated CX function will need less support than one led by the sales director, for example.

Ensure the owner knows and understand you are a CX champion, and eager to be involved. You'll need to be at the table to make an impact. To demonstrate you're passionate about CX, you need to show the marketing function is customer-centric.

It'll be hard to convince others in the company of your value to the programme if you can't demonstrate it within your own arena. This means ensuring your own processes are customer-centric, that your decisions around marketing strategy are based on insights and feedback from customer data, and that marketers within your team are engaged and bought into the customer-centric approach.

Bring them something no-one else can. Use the close observation and interaction with customers that marketing enjoys to provide data around customer profiles, behaviour, or feedback.

Step up and take responsibility. This has to be done sensitively, lest you give the impression you're trying to muscle in on someone else's territory. Look for non-contentious areas where marketing already has a strength – brand building or the close alignment with sales, for instance.

3 ways marketing can expand its remit over CX

- **Establish where you can add value:** Using marketing's traditional strengths you can expand into an existing CX programme to add value there.
- **Be the source of customer insight:** Marketing has access to data and analytics around the customer and potential prospects that do not exist elsewhere in the business. Capitalise on this by identifying insights that will enhance the CX programme. An example of this could be analysis of web traffic plans to find where customers are abandoning their journeys. Present your findings in an easy-to-digest format, such as a dashboard.
- **Identify customer pain-points:** This is a key aspect of any CX programme, but marketing can accelerate the process by examining its own interaction with customers. Proving you can effect change, even on a small scale, will enhance your CX leadership credentials.

Section 3

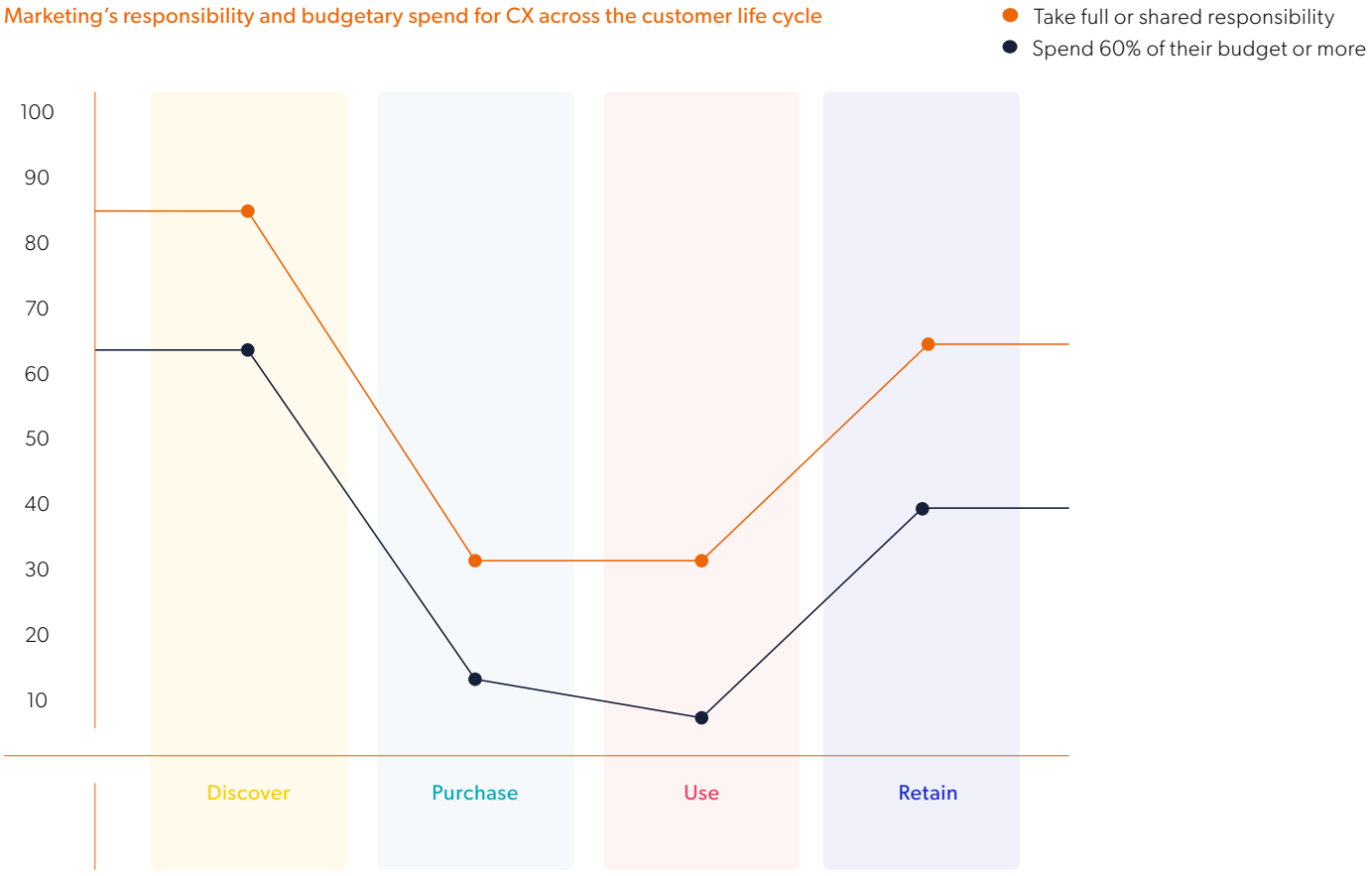
Taking responsibility for the entire customer lifecycle

Results from B2B Marketing's CX survey found that in more than a quarter of companies, marketing has no responsibility for CX either during the point of purchase or during aftercare and training stages – i.e. the middle of the customer journey.

For marketing to be an effective CX owner, it needs to take ownership across the whole lifecycle, even if the management of those areas is left to functional representatives.

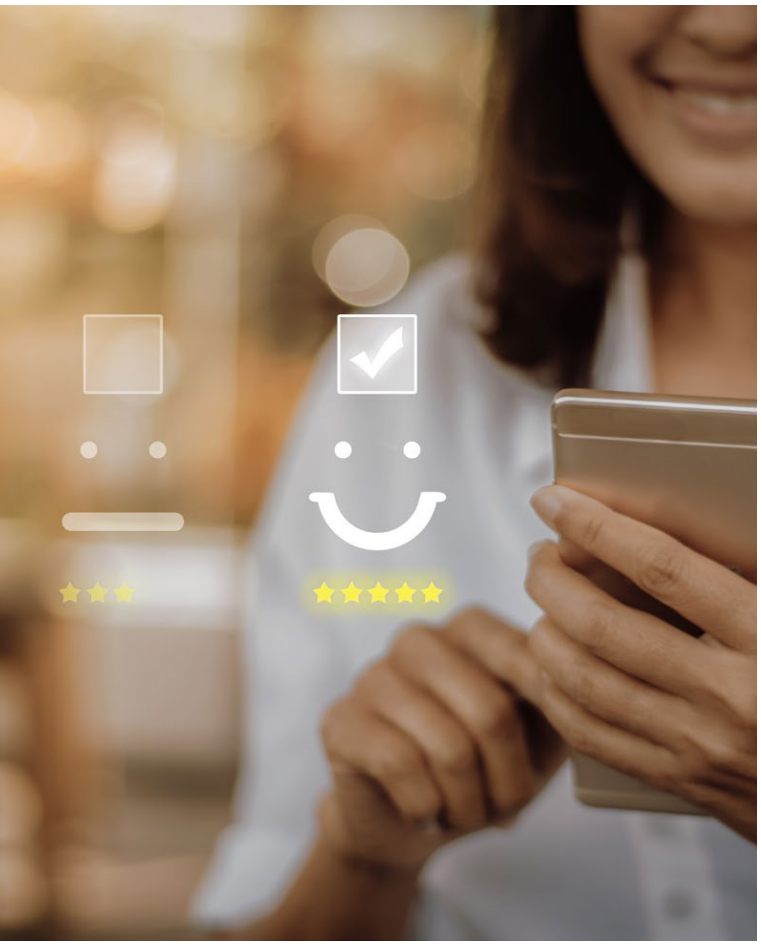
The most common failing within companies when trying to align internal CX processes is the hand-off process between the different stages of the customer journey. This is because each function tends to consider it the responsibility of the other.

Marketing's responsibility and budgetary spend for CX across the customer life cycle



3.1 How to stop customers falling through gaps

- **Frequent, structured communication:** Nothing beats constant communication to plug the gaps. Having CX champions in each function, and making them responsible for communicating progress and then bringing them all together at frequent meetings will improve the flow of information.
- **Oversight and tracking:** Even if you don't have the budget for specific customer experience management technology, many CRM systems have the function to track customer journeys.
- **Establish KPIs:** What gets measured, gets done. Consider metrics around case resolution, volume of queries, plus standard CX metrics such as customer retention, churn and lifetime value.



3.2 How to boost collaboration between functions

Optimisation of the entire customer lifecycle will require close collaboration between the functions that interact with customers on the journey. Here are some practical steps to smooth the interaction between departments

- **Find passionate champions.** Identify those employees that are committed to customer-centricity. Bring them together and harness their energy so they can disseminate it within their own functions. These staff don't have to be the most senior, but they do have to be the most persuasive.
- **Establish working groups.** As the CX co-ordinator, marketing will need to hand over responsibility to functional staff. Launch small working groups and place a champion in charge.
- **Set joint objectives and targets.** Your CX charter will already set out the overall aims and goals of the programme, but when creating working groups and tasks make sure those targets are owned by all members of the group.
- **Use collaboration technology to break down siloes.** This could include communication tools such as Slack or Flock, project management platforms such as Trello or Asana, or if you need to link up across distance tools such as the conferencing platforms Zoom or GoToMeeting. Many of these tools are available for free or at entry-level pricing, so you can test multiple vendors before deciding on the ones that work best for your organisation.
- **Make time for informal collaboration.** The more staff get to know each other as humans, the easier it'll be to collaborate on projects. Consider get-togethers and parties for project kick-offs and to celebrate success.

Section 4

How to map the customer journey

4.1 Mapping the journey

The purpose of a customer journey map is to establish where customers interact with your brand (the touchpoints), where the barriers to progression are, and how that impacts on the experience.

Before you begin a journey-mapping exercise, you should consider creating customer segments or buyer personas, as not every customer will follow the same journey. If you're starting from scratch, focus on journeys for the customers that have the highest spend, lifetime value or retention rate.

Map out each stage of the journey for the customer, identifying each step they would take that would contribute to their purchase decision. Once you've mapped these you may want to divide these between the functions that oversee each of these steps (it's may be more than one function for each of these).

Remember, the B2B purchase decision is rarely the remit of a single individual (the most recent research puts the average number somewhere around six or seven). It's important to account for these within your journey mapping – different entry or exit routes for example.

There might be other influences on the journey too – so called 'shadow buyers'. These are individuals that influence the process but aren't part of the decision-making unit.

Having created your map, it's time to make it more accessible to the wider business. Some businesses are turning to storyboards, illustrating a customer journey through cartoons to make the customer journey more 'real' in the minds of staff.

4.2 Identifying the customer pain-points

Onto your journey map, you need to pinpoint all the interactions a customer will have with your brand. Break these down by each stage of the customer journey.

With the touchpoints highlighted, you should now be in a position to identify areas that your cross-functional CX team could address. Most organisations start by tackling customer pain-points rather than revising whole stages of the journey. This is a way to drive rapid improvement in both experience and return on CX investment by generating quick wins.

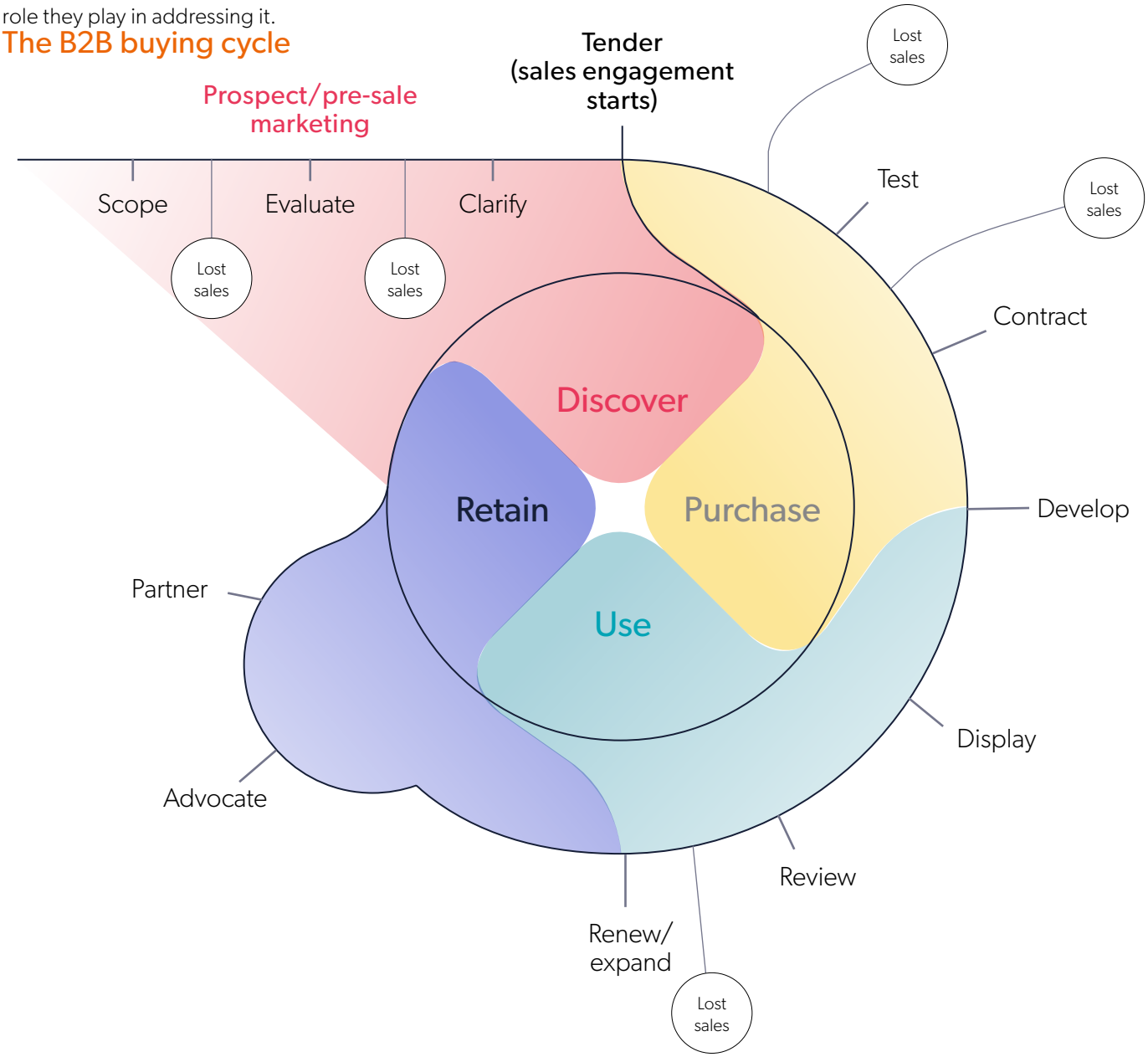
Within your team, rank pain-points in terms of:

- **Business impact** – i.e. the return of fixing this pain-point versus the resource needed to resolve it, plus the potential risk of failing to fix it.
- **Ease of resolution** – how simple will it be to fix the problem?
- **Customer importance** – how does the pain this issue causes affect a client's sentiment toward the brand?
- **Internal perception** – how important the pain-point is considered to be within the organisation, particularly by senior leadership.

Forming sub-teams among your champions to tackle these pain-points is an effective way to build collaboration and gain input from across the organisation. Allocate a project owner, preferably from the function that has responsibility for that stage of the journey.

It's useful to produce a specific journey map for the pain-point you're addressing. Visualising it in this way will also make it easier for those across the business to understand the role they play in addressing it.

The B2B buying cycle



Bernie Kassar, chief customer officer at Xactly, says as you'll need to fund these projects, focus on the ones that generate revenue. For the enterprise software business, that meant concentrating where solving the pain-points would drive adoption, renewal and upsell.

> *"If you have someone in charge of going out to get revenue, why don't you have someone to protect that revenue?"*
>
> **Bernie Kassar, chief customer officer, Xactly**

Section 5

How to drive employee engagement

According to the CX expert and author Blake Morgan, the best companies for customer experience are the same as those that appear on the best or top companies rankings.

Those that are good to their employees are good to their customers. Employee experience expert Jacob Morgan, came up with three foundations of an employee-centric company.

- **Culture:** How do they make people feel?
- **Technology:** Employees want the same level of technology they experience in their personal lives.
- **Physical space:** When you feel good at work, you produce good work.

There are three different groups of employees within a business that need to be engaged by your CX programme.

- **Front-line employees:** These are the staff who deal with and speak to your customers directly, such as sales people or contact centre agents. They'll have insight into pain-points and barriers in the journey. They need to be engaged as they'll be putting your plan into action.
- **Tactical employees:** These are staff such as product or project managers and country managers. They need feedback from the CX programme to feed into their own work, such as product design.
- **Strategic employees:** Previously mentioned, these are senior staff members who set out the organisational strategy and ensure the whole company is onboard.



"Companies don't build to make customers' lives easier and better, they build to make their own lives easier and better. These companies will simply not exist in the next few years"

Blake Morgan, CX expert and author

Case study: Fanatical support at Rackspace

Tech business Rackspace's vision is to be recognised as one of the world's greatest service companies. It's employees – known colloquially as 'Rackers' – came up with six core values that are the foundation of the firm's passion for the success of customers. They are:

1. Fanatical support in all we do.
2. Results first; substance over flash.
3. Treat Rackers like friends and family.
4. Passion for our work.
5. Full disclosure and transparency.
6. Committed to greatness.

There's been an obsession inside the organisation for more than two decades on taking care of customers and putting them at the top of our thoughts when we make decisions as an organisation," says CMO Mark Bunting. "That's the stuff of magic, and aspirationally B2B marketers spend years trying to create a culture in which you care deeply about customers."

Section 6

How can you measure the success of your ownership?

The metrics to measure the success of your programme ownership will differ from those that measure the effectiveness of the CX programme in general.

However, there will be some crossover. Pipeline metrics such as reduced customer churn or new revenue from up-sell, for example, will measure the impact of your programme and ultimately will tell you if it's been effective.

Direct metrics you could use to track the impact include:

- Projects in progress
- Pain-points resolved
- Employee engagement, such as signatures to the CX charter or internal Net Promoter Score
- Pipeline metrics, including new revenue or customer churn
- Return on investment in your programme.

Don't forget traditional CX measures too, which will all indicate the success of your programme. These include:

- Net Promoter Score
- Customer satisfaction (CSat)
- Customer effort score (a measure of how much effort a customer has to make to resolve a query) (CES)
- Retention
- Customer sentiment.

Don't spend too much time focusing on the metrics. Metrics give you a picture in time, and some of the nuance is always lost. The metric also won't tell you what to do next or what the next best action is for customers. With an always-on CX programme the key is to close the loop, by examining the feedback you're getting and actioning that among your project working groups.

To close the loop, make your metrics available to all. Focus on the metrics that matter and present them in an easily accessible way. Real-time dashboards with an overview of the key measurements that everyone can view are an effective way to do this.

The 6 most common mistakes when rolling out a CX programme

1. **The big bang approach that fails:** You don't want to spend a lot of money and then have it scaled back. A CX programme is like a start-up, underfunded and loaded with expectation. Start small, prove the value of the programme, and then expand.

2. **Focusing too much on metrics, rather than outcomes:** Metrics are not the end result, they are used to drive action.

3. **The programme is not based on insights:** The focus of your CX programme should be led by data, rather than anecdotal customer feedback or the whims of senior executives.

4. **Loops are not closed:** Your actions need to feed back to front-line staff, so they can proactively support customers, or internally so it can be incorporated into new product/ service propositions or design.

5. **The CX programme is not embedded internally:** No single function can implement a CX programme alone. Failure to engage senior leadership and employees will lead to failure.

6. **You have the wrong motivation:** You should 'want to' run a CX programme, not 'have to'. The worst reason to implement a CX plan is because you're trying to compete with rivals. You must do it because the organisation sees value in it.

For an in-depth look at CX in B2B, including:

- Models
- Frameworks
- Practical advice
- Care studies
- A simple test to assess your CX competence



Download our members-only report at
b2bmarketing.net/CXpert

About

B2B Marketing

Established in 2004, we are the number one go-to resource for B2B marketers across the globe.

Through our content hub and professional development services – including events, training and networking – B2B Marketing users are empowered with the tools, insight and inspiration they need.

Our promise to you

Things change fast in B2B. Just staying on top of the changes can be a full-time job. So, we do that job for you.

With our subscriber content, training and events we guarantee you'll:

- Put your best-ever strategies in place.
- Lock down the multiple skills, tools and insights you need.
- Find real-world inspiration for rolling out some outstanding marketing initiatives.
- Make the progress you've always wanted in putting marketing at the top table of your business.

How we help you, your team and your business to grow and succeed

- Free online member content, including guides, toolkits, interviews and case studies from experts and inspirational leaders in B2B.
- Premium, subscriber-only content, including industry research, benchmarking and analysis, expert strategy and tactical guides and a *B2B Marketing* magazine subscription.
- Four, flagship UK-based, annual events for B2B marketers and leaders: Ignite; The Conference; Get Stacked; and the B2B Marketing Awards.
- Bespoke training for marketing teams (UK only).
- More than 40 one-day open training courses and workshops each year (UK only).
- Leaders networking, through the B2B Marketing Leaders programme and Leaders Forum (UK only).

First step

- Choose a 12-month subscription to all our Premium subscriber content – for just £399/$499.
- Go to b2bmarketing.net/unlock to find out more about the benefits of subscribing.
- Or call our client services team on +44 (0)207 014 4920.

B2B Marketing

Insight · Development · Training · Events

b2bmarketing.net

B2B Marketing

Insight · Development · Training · Events

Contact us

B2B Marketing
Clover House
147–149 Farringdon Road
London
EC1R 3HN

Tel: +44 (0)20 7014 4920
info@b2bmarketing.net
b2bmarketing.net