



Checking Our Pulse:

How Does Your CX Program Compare?

Today's Speakers:



Troy Powell

VP, Strategy & Analytics



Sean Clayton

Sr. VP, Client Services



About Walker

Walker is an experience management (XM) services firm. Our experts provide wide range of flexible solutions to maximize technology investments and support customer and employee experience initiatives for a wide range of organizations.

Our solutions span four general areas:



Customer Experience

Proven practices, and extensive experience serving hundreds of global brands



Digital Customer Experience

The digital options to deliver effective and efficient customer experiences



Employee Experience

Expert measurement and strategic consulting for best-in-class employee experiences



Patient Experience

A modern approach focused on patients, family members, and healthcare providers

Learn more about Walker at walkerinfo.com

LATEST EPISODE:

TAKE THE TRANSACTION OUT OF THE INTERACTION

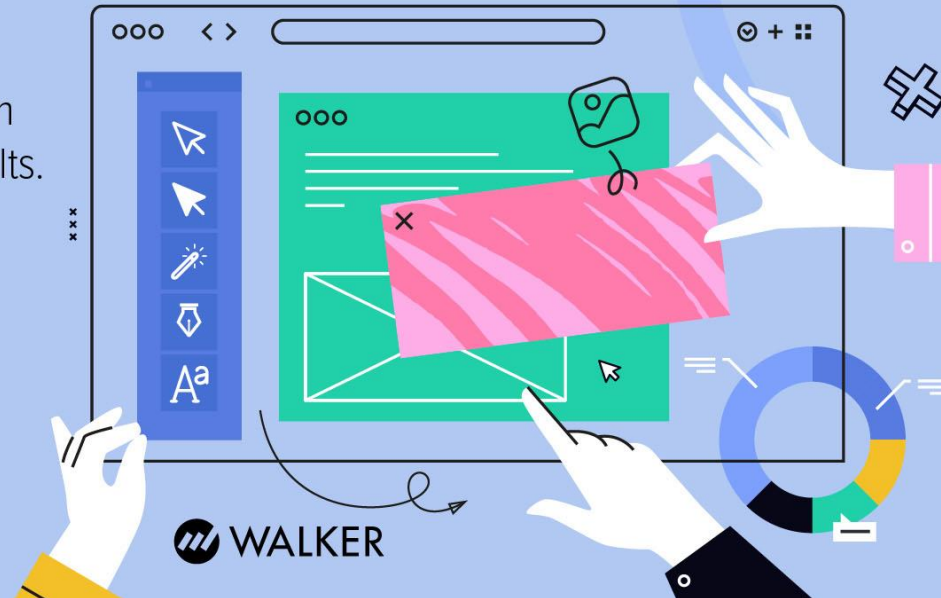
Why innovating how customers interact with your company leads to award-winning results.



with guest
Rajesh Sankaran
A-MAX Auto Insurance

cxleaderpodcast.com

The CX LEADER PODCAST



The podcast for CX leaders.

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What Is the CX Leader Pulse?

The CX Leader Pulse is a concise, practical survey designed to help CX professionals benchmark their program activities against others.

To provide valuable insights for leaders, Walker, in collaboration with the Customer Experience Professionals Association (CXPA), launched The CX Leader Pulse. These brief and timely studies focus on specific CX topics, offering leaders a clear view of what companies are doing within their CX programs—and what they are not.

Pulse aligns with the CXPA's 10-year goal of tracking the impact of CX on organizations. By gathering and analyzing information on CX programs and their impact, we aim to identify which aspects and activities can significantly enhance the value of CX efforts.



CX Leader Pulse Results, Wave 1

CX as a Valued Business Discipline

- 66% of Practitioners Strongly Agree/Agree that CX is broadly viewed as a “valued discipline” within their organizations.
- That means 1/3 of practitioners are struggling to get organizations to value the efforts and potential of CX.

66% Agree



34% Disagree



Effect of Governance on CX Value

HAS CX STEERING TEAM

YES
54%



NO
46%

Agree that CX is valued in the organization



HAS CX CHAMPIONS

YES
39%



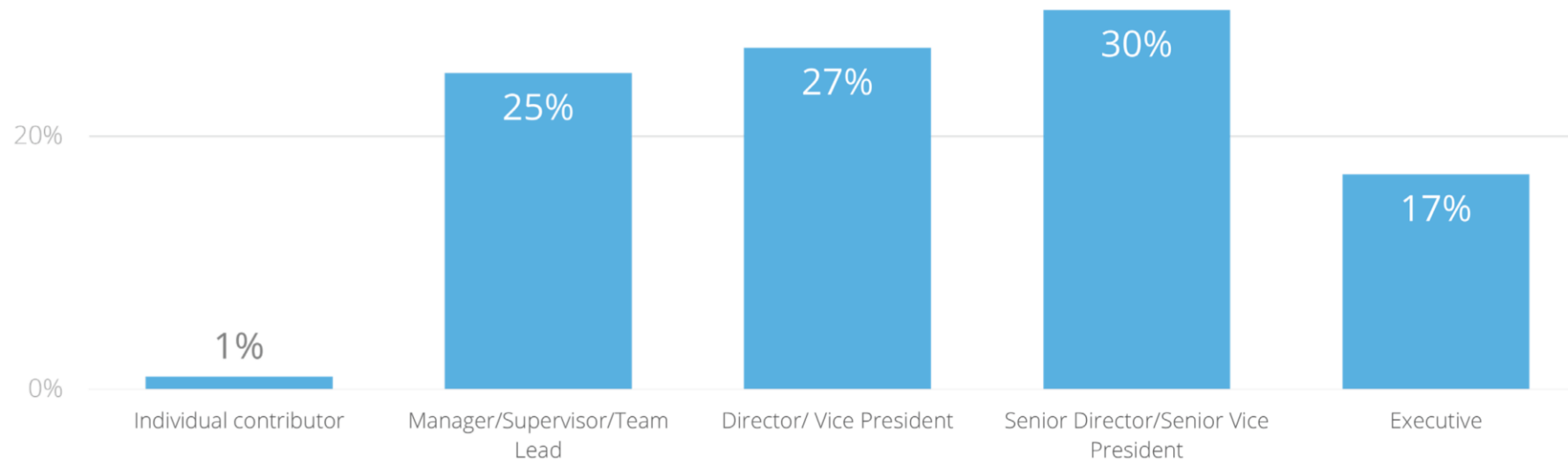
NO
61%

Agree that CX is valued in the organization



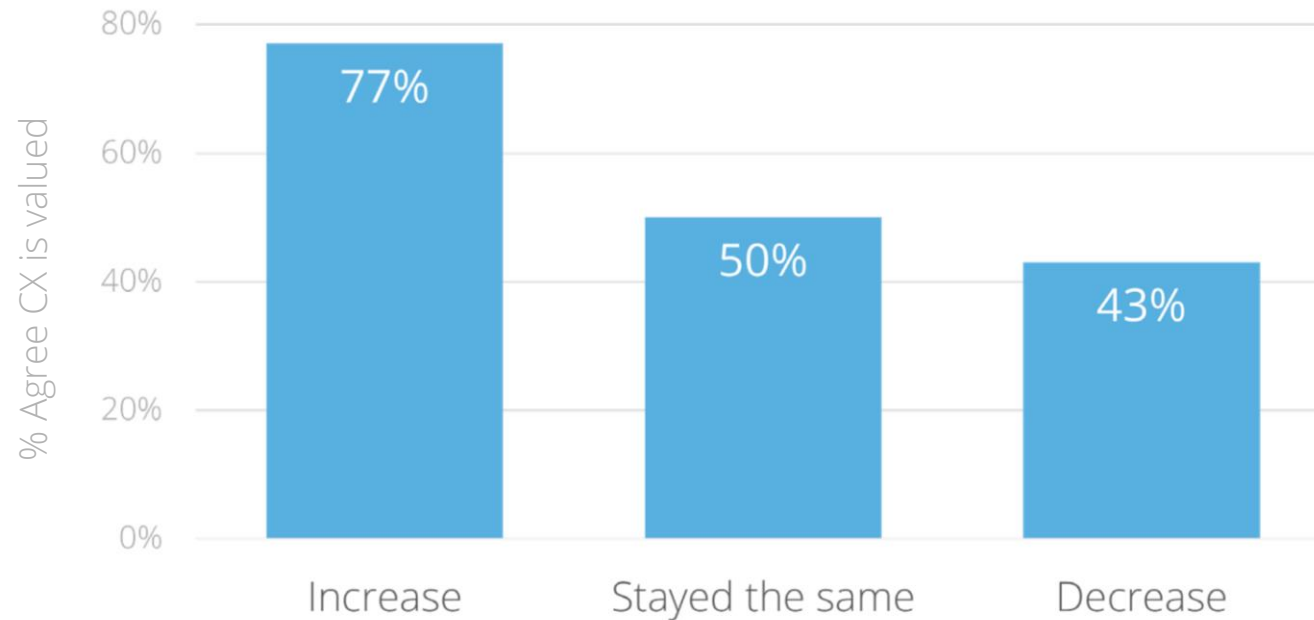
CX Team Leader

- 74% of CX teams were headed by a VP/Director level or above
- 47% by a Senior- or Executive-level leader



CX as a Valued Discipline by Historic Investment in CX

- Organizations who have increased their investment in CX over the last 2 years also have higher ratings of CX as a valued discipline
- 55% of CX professionals report having an increasing budget over the last 2 years



How To Make the Most of CX With Good Governance

Why It Matters

CX GOVERNANCE

Program is connected to strategy

Leaders are committed to program success

Clear understanding of resources required

Everyone is aligned on purpose/objective

A plan is established & refreshed regularly



Signs of Ineffective Governance

All talk no action

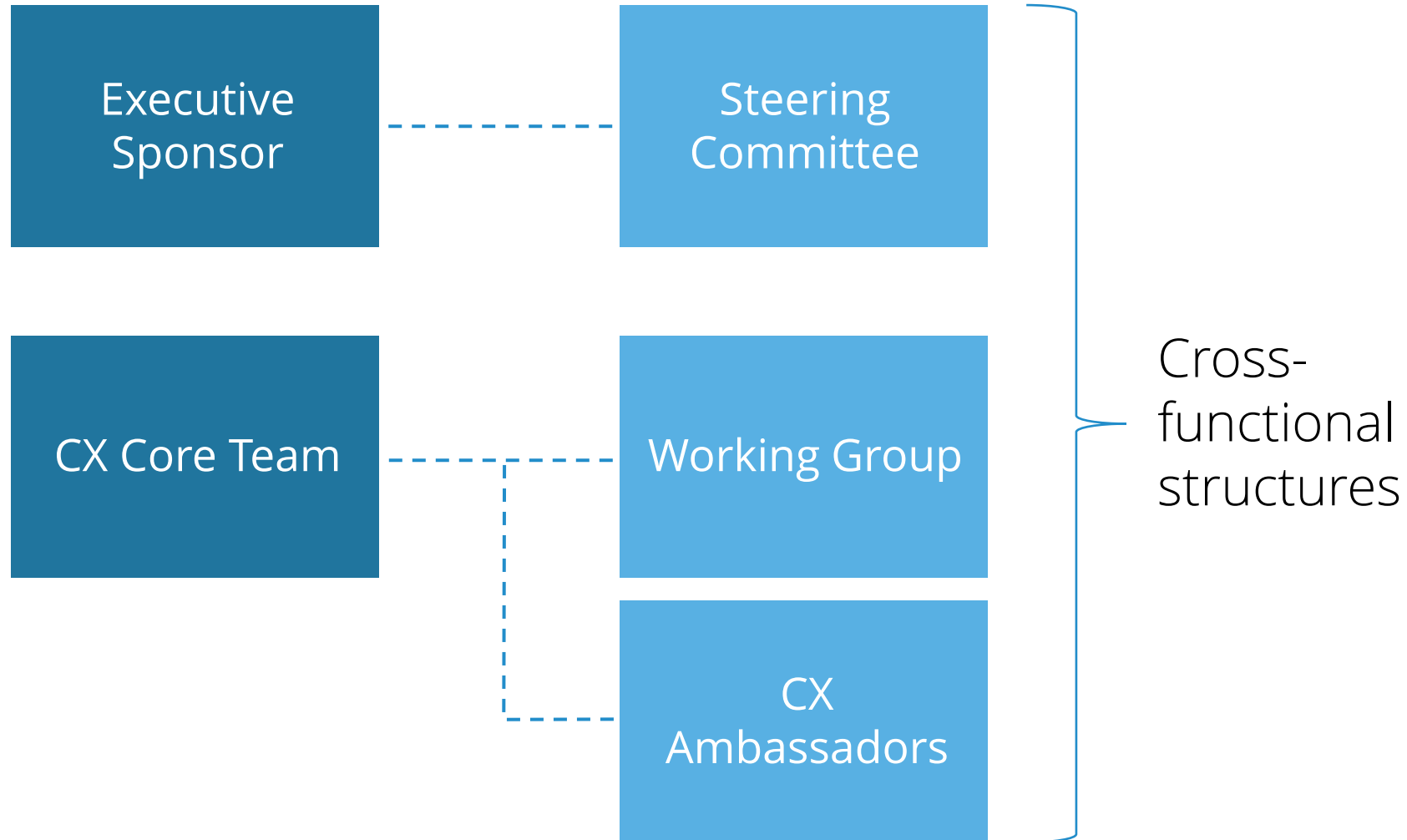
No executive presence, lack of leadership (all delegates)

No budget or enforcement powers

Part-time job for core team/ leader

No follow-up or accountability

CX Governance Blueprint



Keys to Success

The Executive Sponsor has the right positioning and influence with senior leaders

The Core Team is able to build strong working relationships across the organization

The Steering Committee serves as business partners with the Executive Sponsor and Core Team

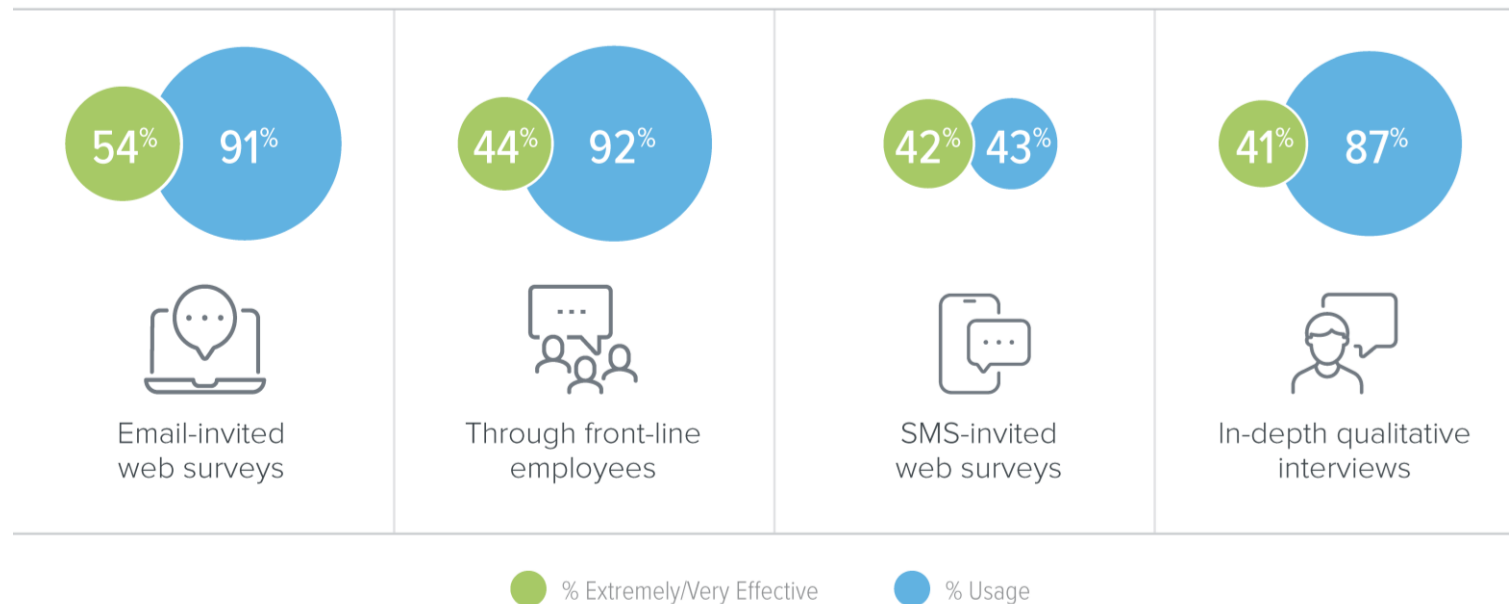
The “best” cross-functional representatives are actively involved as members of the Working Group

The CX Ambassadors are actively managed against a well-defined plan

CX Leader Pulse Results, Wave 2

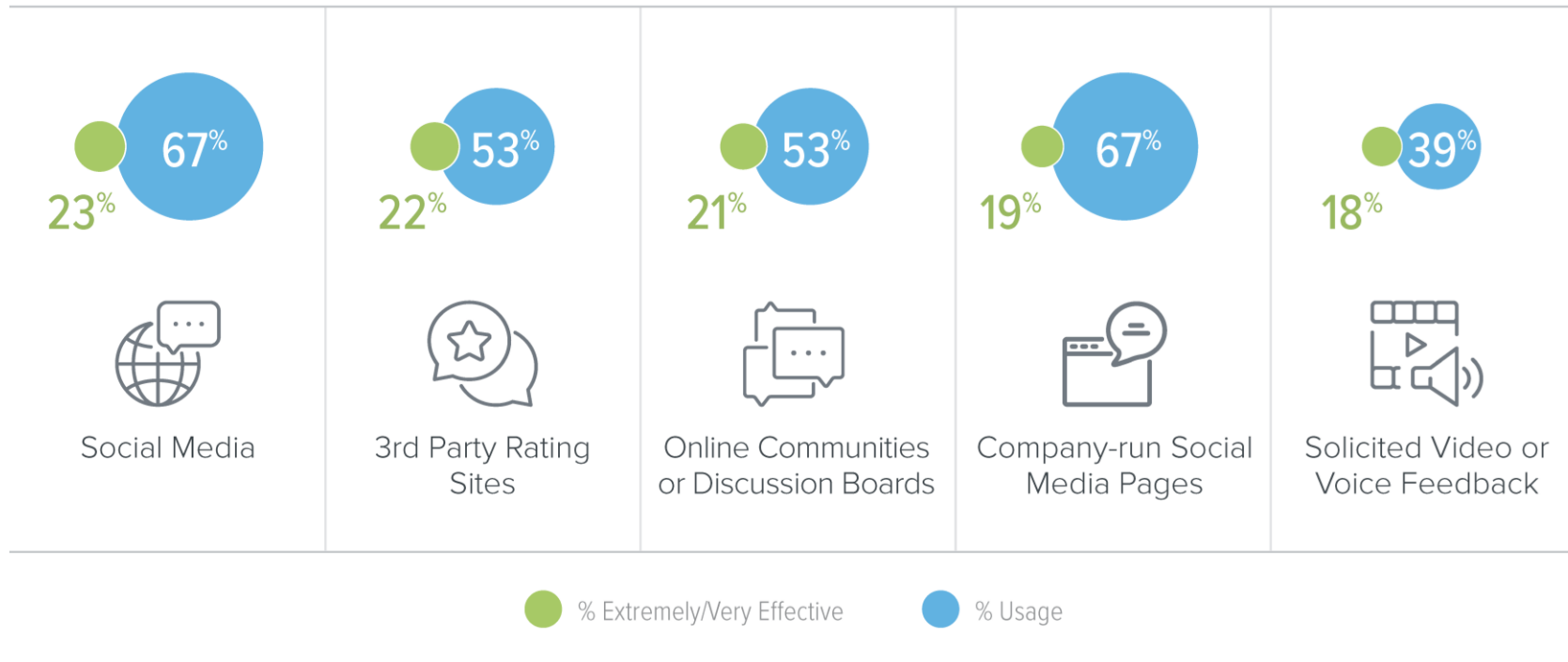
Top 4 Effective CX Channels

- Overall, effectively driving action through collected customer feedback is very low – Only 32% of CX Pros are rating their efforts as effectively driving action.
- The top 4 channels by effectiveness of driving action in the organization are all solicited feedback methods with 2 of them being standard web surveys.
- 3 of these channels have the highest usage rates of all channels.



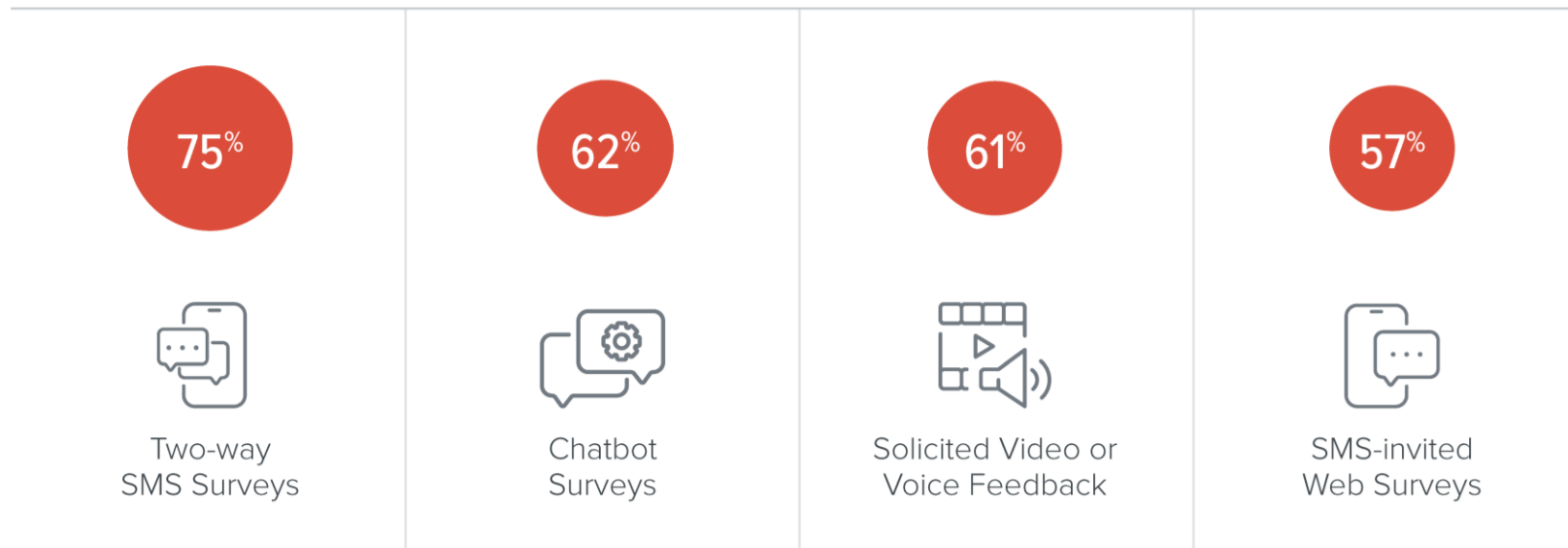
Bottom 5 Effective CX Channels

- CX Pros seem least effective at using unsolicited, unstructured data to drive action, but they are trying to incorporate these data at an average or slightly below average rate.
- The least effective channel is a solicited method but uses less known technology channels.



Top "Never Used" CX Channels

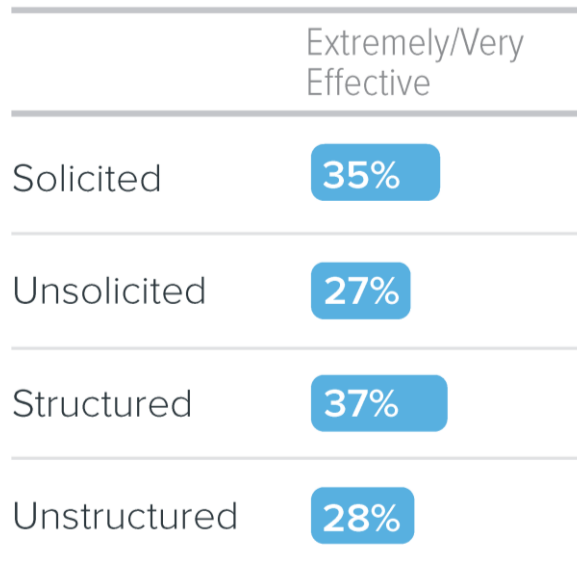
- A majority of CX Pros have never used SMS channels, either two-way or just invites to a web survey, in the last 12 months.
- Alternate modes of soliciting feedback using survey-like questions aren't used by a majority of CX Pros (SMS, Chatbots, video- or voice-based surveying)
- Given the growing use of AI-driven Chatbots for service and support, we wonder if there will be an increase in using them to solicit customer feedback.



 % Never Used

Solicited and Structured matrix

- CX Professionals are more effective at getting organizations to act on Solicited and Structured data
- Still facing challenges with Unstructured data, especially when it's Unsolicited.



	SOLICITED DATA	UNSOLICITED DATA
STRUCTURED DATA	<ul style="list-style-type: none"> • Email-invited web surveys • Through front-line employees (voice of the customer through employees) • SMS-invited web surveys • Pop-up or Embedded digital surveys in apps • Pop-up or Embedded digital surveys on websites • Two-way SMS surveys • Chatbot surveys on company-owned or 3rd party websites/apps (e.g., WhatsApp, Messenger, etc.) 	<ul style="list-style-type: none"> • 3rd party rating sites
	EFFECTIVENESS SCORES	
	39%	22%
UNSTRUCTURED DATA	<ul style="list-style-type: none"> • In-depth qualitative interviews • Digital or in-person ethnography • Customer advisory boards/groups • Focus groups • Solicited video or voice feedback through web surveys, apps, or smart speakers/devices • Through front-line employees (voice of the customer through employees) 	<ul style="list-style-type: none"> • Feedback submitted via company website or app (passive digital feedback) • Call transcripts with customers • Chat or email transcripts with customers • Social media • 3rd party rating sites • Online communities or discussion boards (e.g., Reddit, etc.) • Company-run social media pages
		30%



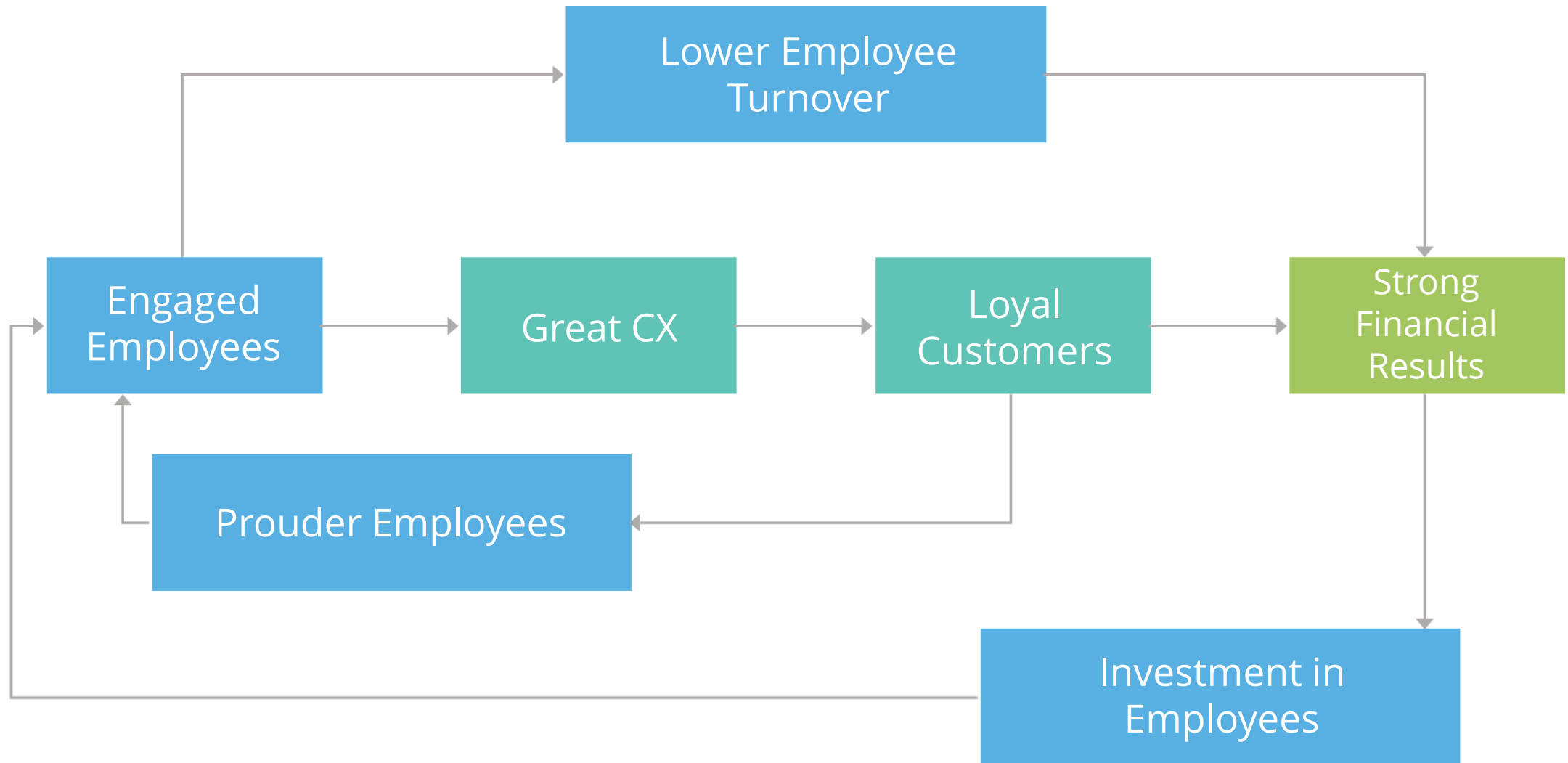
Utilizing the Voice of the Customer Through Employees (VoCE) Channel

VoCE

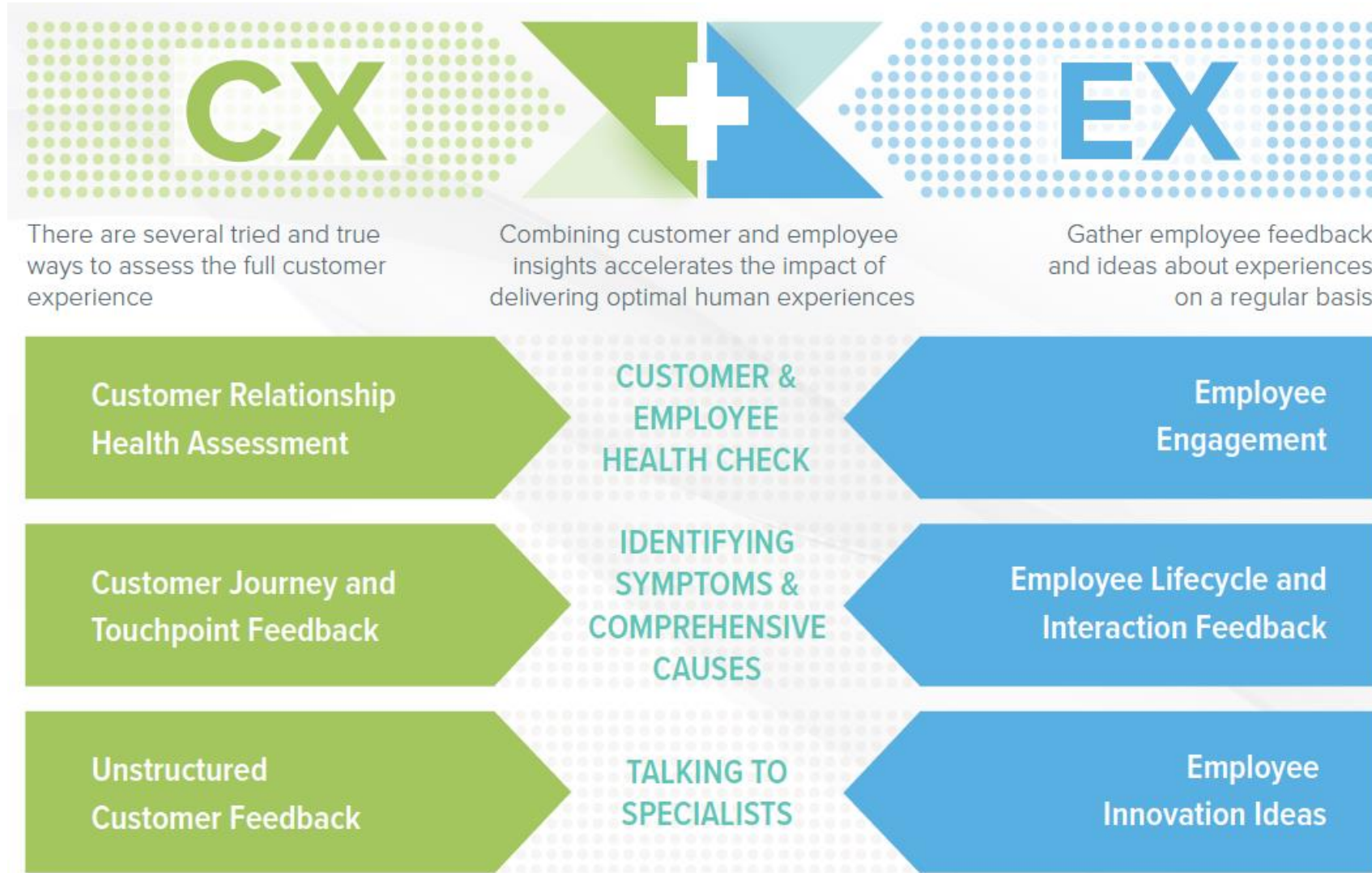
Voice of the customer through the employee is about understanding customers' experiences by asking the employees who work with them the most.



Learning From Frontline Employees Is Part of a Virtuous Cycle



VoCE is an Integral Part of a Unified CX + EX Listening System



Most Organizations Already Have VoCE Sources They Can Tap Into

Employee surveys
(engagement, ad
hoc, etc.)

HR-facilitated
employee
roundtables

Internal social
channels (Slack,
Teams, etc.)

Employee exit
interviews

Intranet portal
suggestion box

CRM system sales
rep notes

Account
management
documents

Customer
support system
agent notes/logs

Tips To Get Started With VoCE

Add a few questions about employee perceptions of the company's delivered customer experiences in employee engagement surveys

When specific issues are identified through customer listening, send targeted, ad hoc surveys to the appropriate employees to get a 360-degree view of the problem

Develop QBR forms for sales & account teams to capture key customer commentary during account reviews

Embed passive feedback forms in systems used by customer-facing staff to capture thoughts, issues & solutions in-moment, allowing other staff in each group to up-vote issues & solutions

Upcoming Wave 3

WAVE THREE

Share your insights.

Our next wave focuses on **Core and Complimentary Software Platforms** that CX teams use or regularly interact with to collect, analyze and disseminate CX insights. We'll gather input on CX team usage of different software categories along with the top platforms within those categories. In addition, we will gather CX professionals' feedback on which of these software categories are the most and least helpful in getting their organizations to act on customer feedback.

If you want to be invited when Wave 3 launches, please fill out the form at <https://walkerinfo.com/pulse>, and we will send you an invitation.

To get more information about The CX Leader Pulse and to see past and future reports, visit: <https://walkerinfo.com/pulse>

The
**CX LEADER
PULSE**



Questions?

Thank you!