



# The Effective CX Leader

10 Traits of top customer experience leaders





WALKER

# THE EFFECTIVE CX LEADER

What makes an effective CX leader? What skills do they possess? What do they do differently?

Knowing that you can be more effective when you're aware of your skills, Walker has gathered input and developed an inventory of key skills with advice on how you can develop each one.

## THE 10 TRAITS OF EFFECTIVE CX LEADERS:

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# PASSIONATE

While passionate is a difficult trait to define, it's not hard to spot.

Passionate people exude energy and are upbeat and optimistic. We see this trait in the most effective CX leaders. They are enthusiastic about ensuring great experiences for customers and they believe in the power and impact of CX. Put simply, they enjoy what they do and know it makes a difference!

And their energy is contagious. Others notice their passion for CX and join them in doing things that benefit customers and generate positive results for their business.

“Determination. Conviction. Stick-to-it-iveness. Passion isn't just about loving what you do; it's about sticking with it and holding firm.”

Five ways CX leaders can develop or maintain their passion:

1. Create goals (personally and professionally).
2. Keep putting yourself in your customer's shoes – don't fall into the “it's how we do it” mindset or “we can't change.”
3. Identify and lean on mentors – find people you admire and can learn from, providing guidance and support in your goals.
4. Expand your network – get to know people outside your normal circle.
5. Be bold – take calculated risks, take action.





# KNOWLEDGEABLE

## The most effective CX leaders really know what they're doing.

These leaders have a strong sense of the goals they are setting out to achieve. Equally important, they understand all the steps and details necessary to achieve these goals. They consistently demonstrate good judgment in developing strategies and tactics to understand customer needs, anticipate emerging demands and design excellent experiences.

This grasp of what it takes to lead customer experience initiatives makes them a valuable asset to the company and an outstanding role model for others involved in customer-focused strategies.

“The listening component is a really important way for CX professionals to have a pulse on what the root cause issues are, and that brings the credibility and depth of knowledge to the conversations they have within their organizations.”

### Five ways CX leaders can become more knowledgeable:

1. Listen to customers and fellow colleagues to understand pain points and give direction to CX efforts.
2. Regularly scan the changing CX landscape to stay up-to-date on current industry trends.
3. Put in the time to prepare compelling CX messages and stories that will resonate with executives and connect to company priorities.
4. Join a professional networking group to meet like-minded professionals who can be a source of best practice sharing.
5. Seek out new experiences to build your CX arsenal and knowledge base.





# COMMUNICATOR

Leaders in virtually every field possess strong communication skills. CX is no exception.

The most effective CX leaders communicate the importance of CX in a way that not only encourages empathy for customers but also presents CX as a vital business strategy. This is true when they deliver presentations and lead workshops and in daily interactions with internal and external stakeholders.

In today's business, the customer's story is supreme. And these leaders know how to effectively tell that story in a way that motivates others to act.

“Being a good communicator is ensuring that everybody in your organization understands how they connect and relate to customer experience.”

## Five ways CX leaders can be a better communicator:

1. Take the CX message beyond your immediate team. Involving other functional areas ensures the overarching CX messages are spread across the organization. Think about having a broad brush every time you're communicating.
2. Ensure everyone understands how they fit into CX. Whether associates serve the customer directly or indirectly, they need to understand how they fit into the overall CX puzzle.
3. Tailor your communications to your audience. For example, when communicating to executives, focus on areas like ROI and impact. When communicating with front-line employees in a service or support role, focus on how their day-to-day interactions influence customer experiences and perceptions.
4. Tell a story. Working in CX, you collect all kinds of customer stories. Share them! Helping employees understand what customers are thinking, feeling and doing will bring customers to life and create empathy.
5. Don't tackle it all yourself. Create advocacy networks and ambassador programs to help drive CX in your organization. These people can help you champion the customer experience, identify customer pain points and drive improvement initiatives with the appropriate teams.





# COLLABORATIVE

As challenging as it may be, every business needs people who can get everyone moving in the same direction.

This “get it done together” attitude is a skill of the most talented CX leaders. They effectively work across silos, involving others and working together to meet and exceed customer demands. They can cut through departmental agendas to confer, cooperate and persuade to arrive at the best solution for the customer.

No one can do it all themselves. Nor can they freely delegate. The best CX leaders recognize this. The answer is to roll up their sleeves and collaborate.

“Working together to get things done. Taking a team approach to things. Seeking to understand the perspectives of other people in the organization and being inclusive in how you bring forward ideas, how you generate solutions and how you harness the energy of the whole team to get to the best possible outcome.”

## Five ways CX leaders can become more collaborative:

1. Be human – connect in person, on meaningful topics that will build relationships that go beyond a particular project. Don't hide behind tech-driven communication, especially if you're new to your role or your company.
2. Listen first – resist the urge to 'tell' or 'teach.' Instead, seek to understand by asking questions, then truly listening to the answers, probing to uncover the areas where other leaders need support.
3. Build trust – do what you say you will do, and invite open and honest feedback on all topics. Similarly, as you share your ideas and plans, be receptive to new perspectives, and shift course when it will lead to a better outcome.
4. Engage people early – collaboration doesn't mean just informing others of your plans; it means inviting influential representatives from all relevant teams to be part of the visioning and solution design, so they can more easily build support for the solutions they have invested in creating.
5. Connect initiatives to broader objectives – prioritize the initiatives that are going to move company goals and strategies forward, that will create value for the organization, demonstrate how CX generates results and increase the receptivity to future ideas.





# INFLUENTIAL

Influence. Credibility. Respect.  
These words are often associated  
with leaders of all types.

This is true for the most successful CX leaders. They have shown the ability to open the minds of colleagues and ensure action takes place, change occurs and results are realized. Because CX leaders often work with a broad range of departments and employees, they often do not have the authority to mandate action. That's why influence is an important trait that they skillfully leverage.

The best CX leaders know that a little influence can go a long way.

“Because of the organizational situation that they are usually in, CX professionals need to be able to influence a lot of stakeholders in their organization to accomplish the things their customers are asking them to change or improve.”

## Five ways CX leaders can be more influential:

1. Tell compelling stories – don't just talk about results or scores; instead, describe what is happening to customers and how they feel about it.
2. Ask for forgiveness – don't ask for permission, go do what needs to be done.
3. Find your allies – every organization has some people who are more likely to 'play along'. Once they emerge, use them to your advantage to build success stories.
4. Make everybody else look good – give the credit for that success to your allies and peers. It will keep them coming back for more.
5. Believe in yourself and what you know – no one knows more about what's happening with your company's customers than you do!





# ANALYTICAL

Customer data is extremely useful in the hands of the right professional.

Effective CX leaders know how to use customer data to optimize their customers' experiences. They see the benefit in digging deep and testing assumptions to understand the necessary initiatives to launch and actions to take to meet customers' needs. The best CX leaders are skilled at being open-minded but action-oriented. They seek the right data, conduct solid analysis, uncover customer needs and frustrations, and transform all of this into practical intelligence for better decision-making.

Today's businesses have an abundance of data. Skilled CX leader know how to put it to use.

“When I think of being analytical, especially in the realm of being a leader, it's not so much in the skills – like, in the ability to do analysis. I see it more as being analytical in your mindset – how you approach problems, how you approach the customers.”

## Five ways CX leaders can develop better analytical skills:

1. Develop a culture of persuasion. Accept, even invite, alternative perspectives and use data to test them.
2. Be willing to “kill your darlings.” Leaders often strongly adhere to a preferred approach or perspective, but this can blind them to the truth unless they commit to using analytics to test their assumptions.
3. Resist being paralyzed by analysis. Use experiments and rapid innovation practices to quickly test hypotheses and find CX strategies that work.
4. Be relentless in seeking context for customer data. Big Data and analytics are important to optimizing the customer experience, but CX leaders must also supply Thick Data about customers – data that helps us understand why customers act.
5. Focus analytics on improving daily decisions, not just strategic ones. CX leaders can become overly focused on conducting analysis for strategic, executive level briefings, but analytics are most effective when they impact daily experiences of customers.





# FOCUSED

So many customers! So many possible projects! Where do I start?

The most effective CX leaders know the answer to this question. They are skilled at prioritizing customer-centric initiatives and are persistent in seeing them through to have the greatest possible impact. It's true – there's no shortage of possible projects to undertake, but the best CX leaders know which ones to pursue and how to keep them alive. They are determined to make progress.

Laser focus and relentless pursuit – this is how effective CX leaders deliver maximum value for their organization.

“Focus is what allows us to stay the course and to get something important accomplished that's going to be difficult and going to have challenges along the way.”

## Five ways CX leaders can be more focused:

1. Champion a key customer need. Rather than attempting to measure and manage everything under the sun, consider orienting your CX focus around one major topic for the year. Ease of doing business, innovation and customer focus are good examples.
2. Pilots. Try something new on a limited scale; refine it, build trust and then scale it.
3. Collaboration. Extend your reach through communication planning and inclusion of other key stakeholder groups. CX Leadership teams and Ambassador programs are a good way to start.
4. Persistence. Expect some resistance. It's natural. The best CX leaders exude confidence and excitement about what they do and have their 'elevator speech' refined and ready to go in the face of pressure.
5. But not too much persistence. Like every other CX leadership trait, it's a matter of balance. It is possible to be TOO focused. CX teams must stay connected with changing business strategies and information needs.





# INNOVATIVE

Most people think of innovation as new products and features.

Successful CX leaders think differently: They develop ways to design an innovative experience for customers.

They take the time to intimately understand the customer journey – all the interactions that create an overall experience for customers. Not only do they work to improve the existing experience but they think outside the box to create a new, ideal experience for customers. They create breakthroughs that get the attention of savvy customers.

These leaders are creative problem solvers who leverage CX to stand out from the competition.

“Customers aren’t going to tell you how to design the next innovative product or category or service. But as you get closer to understanding them, and understanding what makes them tick, you can start to pull out what the needs are that they have and then from there start to think about how to develop a solution to those needs.”

## Five ways CX leaders can become more innovative:

1. Create a deep understanding of (and empathy with) your customers.
2. Leverage employees for co-creation. Those in other departments may bring out-of-the-CX-box ideas or implementation solutions.
3. Prototype and rapidly iterate, then build on the most successful ideas.
4. Implement and embed initiatives consistently across the customer journey.
5. Don’t get complacent or let it get stale.





# CATALYST FOR CHANGE

Most people don't like change. That's why the most effective CX leaders are the ones who make change happen, regardless of the obstacles in their way.

Effective CX leaders understand that their role is far more than listening to customers, managing metrics and sharing customer intelligence. In addition to these responsibilities, they embrace their larger role as an important agent for change. They see how changes, large or small, can deliver a better experience for customers – and they work diligently to make it happen.

Driving customer-focused change is a rare skill held by only the most effective CX leaders.

“When we talk about driving change, we need to be able to balance the needs to commit to those big, long-term, complex changes, but at the same time we need to get some quick wins.”

Five ways CX leaders can be a stronger catalyst for change:

1. Secure leadership support. Getting the organization on board for change requires support from the top. Remember, the best person isn't always the one with the highest title – reputation goes a long way.
2. Find your advocates. Who do you work with or know of who is also passionate about CX?
3. Don't get siloed. A customer's experience with you is not defined by your organizational structure – and neither should your approach to driving change. Think broad!
4. Build a team. No one person can drive organizational change alone. Cross-functional teams are critical to having a big impact.
5. Identify your organizational barriers. Organizational culture, recognition systems, communications and having the right CX efforts in place can all be accelerants or barriers to driving change.





# BUSINESS SAVVY

The most effective CX leaders understand the need to demonstrate how CX initiatives deliver a financial return to the company.

However, these business-savvy leaders know it's more than simply tracking dollars and cents. They begin with an intentional approach, aligning CX undertakings on the potential impact they will ultimately have on the experience of customers. What's more, they constantly monitor CX initiatives to ensure they are consistent with the organization's broader strategies.

Ultimately, effective CX leaders align customer experience strategies with business goals and demonstrate a strong return on investment.

“The business savvy individuals develop a range of skills and behaviors and extensive knowledge on their discipline and their industry. They have the ability to understand how an action in one part of the business can affect a team in another area of the company. They have this perception and perspective of the organization that is holistic. They understand how the entire entity operates.”

## Five ways CX leaders can be more business savvy:

1. Define the customer strategy to support your business's most strategic priorities (e.g, to win new customers, to expand revenue streams with existing customers or to enter new markets).
2. Align the execution of the customer experience to deliver on the promises your brand makes.
3. Gain a 360-degree perspective of the business through the people, processes and technology that are used to deliver the customer experience today.
4. When driving change, a deep understanding of how existing work gets done will enable a business-savvy CX professional to get very prescriptive about needed changes to roles/responsibilities that will lead to an improved customer experience.
5. Measure the impact of CX changes on the business (e.g., improved retention, improved profitability, improved sales hit rate).



# SELF-EVALUATION TOOL

Do you search out every little tip for making the most of CX? Or do you love digging in to the numbers to get down to the nitty gritty of which strategies are working and which aren't? Is seeing how CX fits into the bigger picture of your company's strategy more your speed?

This self-evaluation tool gives you a visual representation of your strengths and growth opportunities as a CX leader. You can plot your whole team to best capitalize on strengths and see who can help others shore up their weaknesses. After following the tips for several months, use the evaluation tool again – you'll be amazed at how much you've grown!



## PASSIONATE

You are enthusiastic about ensuring great experiences for customers and believe in the power and impact of CX.

I'm just going through the motions when it comes to CX.



I'm totally into everything about customer experience.



## KNOWLEDGEABLE

You demonstrate good judgement in developing strategies and tactics to understand customer needs, anticipate emerging demands and design excellent experiences.

I have no idea what I'm doing. Who gave me this assignment?



I totally understand CX. This role was made for me.



## COMMUNICATOR

You effectively communicate the importance of CX in a way that not only encourages empathy for customers but also presents CX as a vital business strategy.

I don't really talk about CX with others.



I'm constantly touting CX at our company.



## COLLABORATIVE

You effectively work across silos, involving others and working together to exceed customer demands.

I really try to handle everything myself.



I'm constantly working with others on CX projects.



## INFLUENTIAL

You have shown the ability to open the minds of colleagues and ensure action takes place.

I can't seem to get anyone to do anything.



I do all I can to influence colleagues to drive action.



## ANALYTICAL

You see the benefit in digging deep into customer data to test assumptions and understand the necessary initiatives to launch and actions to take.

I don't really bother with customer data. It's too overwhelming.



I'm all about getting the most out of customer data.



## FOCUSED

You effectively prioritize customer-centric initiatives and are persistent in seeing them through to have the greatest possible impact.

I can't keep everything straight – I'm constantly juggling priorities.



I have specific priorities that always come first.



## INNOVATIVE

Not only do you work to improve the existing experience but you think outside the box to create new, ideal experiences for customers.

I stick to what I know – the same process all the time.



I'm always thinking of ways to design better experiences for our customers.



## CATALYST FOR CHANGE

You understand your responsibility as an agent for change in your organization and have developed methods to effectively drive change.

I really prefer the status quo. I don't want to push people to change.



I push relentlessly for customer-focused change.



## BUSINESS SAVVY

You effectively align customer experience strategies with business goals and demonstrate a strong return on investment.

I don't really understand my company's goals or how CX fits with them.



Everything I do is closely aligned with our strategies and measured meticulously.

# 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](http://walkerinfo.com)

Walker is also a member of the Qualtrics Partner Network (QPN) where we combine our award-winning professional services with Qualtrics' industry leading XM technology to deliver results for our clients.



# THE CX LEADER PODCAST

The CX Leader Podcast provides weekly insights for business leaders to improve results by unlocking the potential of their customer experience. More than a discussion of CX topics, the podcast focuses on ways CX professionals can develop the right skills and ideas to be effective leaders in their organizations.



## More than 300 Episodes

The CX Leader Podcast explores a wide range of customer-focused business topics. Here are just a few:

- B2B Versus B2C CX
- Luminaries of CX
- Intersections With CX
- The Influence of Technology
- CX Users
- CX Horror Stories
- Change Management
- Journey Mapping
- Immersion Experiences
- Customer Listening Architecture
- Traits of Effective CX Leaders
- The Future of CX
- Qualtrics XM Operating Framework
- Trends in CX
- CX Best Practices
- Emerging Leaders in CX
- The Value of CX

## CX Expert Guests

Covering a wide variety of topics, guests have included customer experience practitioners and professionals spanning several industries.

Past guests include:

- Bob Azman
- Angie Hicks
- Jay Baer
- Megan Burns
- Bob Thompson
- Diane Magers
- Shep Hyken
- Bruce Temkin
- Jeanne Bliss
- Annette Franz

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