



# Keys for CX Success



The background of the slide features a dark silhouette of a person standing on the right side, facing left. The wall behind them is covered in diagonal lines, creating a textured, architectural look. The lighting is dramatic, with the person's shadow cast onto the wall.

# 1 KNOW your CUSTOMERS



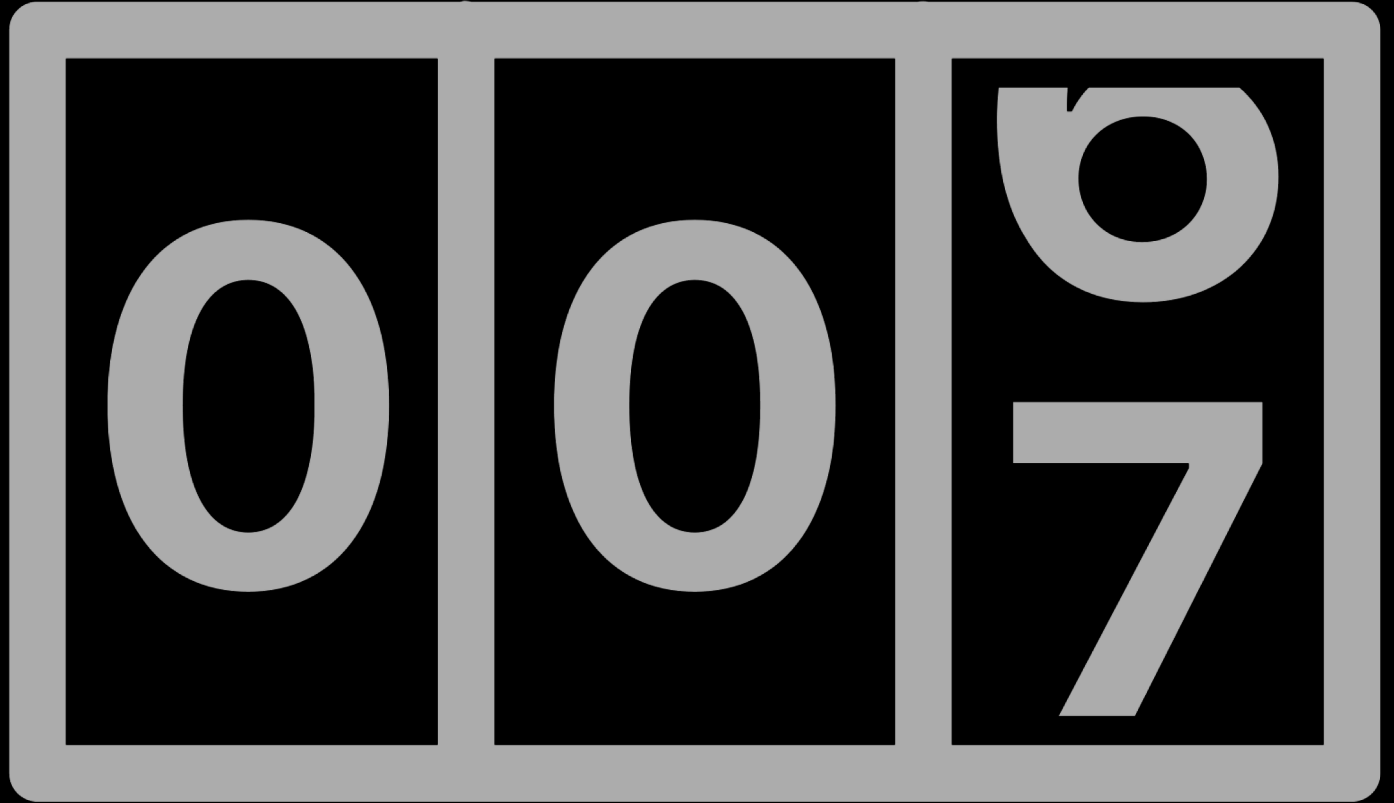
A 5x2 grid of 10 diverse people representing various demographics. The grid includes a young man with headphones, a young woman, a woman with glasses and a denim jacket, a woman with glasses and a white lab coat, a woman in a graduation cap, a man with a beard and glasses, a man with a beard and glasses, a woman in red scrubs, a woman in a white lab coat, an older woman with glasses, a woman with long brown hair, an older man with glasses, an older woman with glasses, and a man in a blue hard hat and orange safety vest.

# Understand your customer DEMOGRAPHICS

# Diagnose Strengths, Weaknesses and Opportunities by AUDIENCE SEGMENT



How  
FREQUENTLY  
are they  
interacting  
with your  
organization





Understand your  
customer's  
INTENTION!



# BUILDING PERSONAS

Lee is a server at a restaurant. He considers himself a trendy guy and is looking for something that will look great while he's working and when he's out with friends. He's interested in the Apple Watch collection and has narrowed down his choices to these favorites:

- Apple Watch 42mm Stainless Steel Case with Milanese Loop
- Apple Watch 42mm Stainless Steel Case with Stainless Steel Link Bracelet
- Apple Watch 42mm Space Black Stainless Steel Case with Space Black Stainless Steel Link Bracelet



What's your opinion on what will enhance his personal style?



2

ACTIVELY  
LISTEN to  
Your Customers





Find out  
**WHAT** your  
customers  
want and  
**HOW** they  
want it





**LISTEN** to Customers in  
**EVERY CHANNEL**



# FOLLOW UP on complaints and requests





Provide EXPANDED DIALOGUE  
opportunities for your  
customers

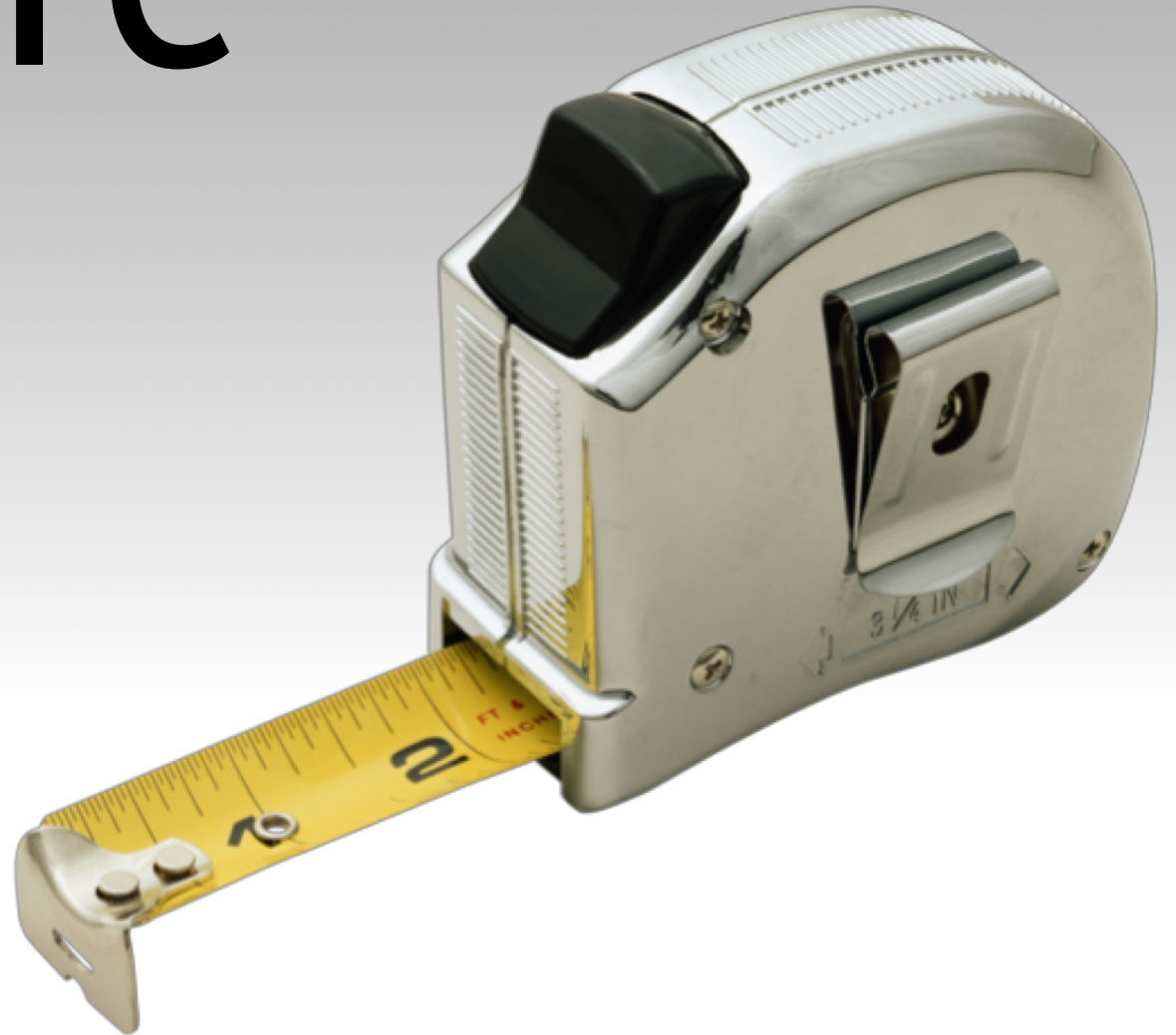






Train  
agents on  
ACTIVE  
LISTENING  
skills

# 3 Measure



You can't **MANAGE**  
what you don't  
**MEASURE**







integration


data

INTEGRATE  
quantitative  
and qualitative  
analytics

A silhouette of a person standing on the peak of a jagged rock formation, with arms raised in a 'V' shape. The background is a sunset sky with a gradient from dark blue at the top to orange and yellow near the horizon. The sun is visible on the right side, creating a lens flare effect. The overall scene conveys a sense of achievement and triumph.

Measure  
PERFORMANCE  
against GOALS  
and OBJECTIVES



A woman with long blonde hair, wearing a light blue long-sleeved shirt and a black backpack, is seen from the side, looking down at a smartphone in her hands. She is standing in a crowded public space, possibly an airport or train station, with other people blurred in the background. A semi-transparent dark grey box is overlaid on the right side of the image, containing white and teal text.

Measure **IN-CHANNEL**  
the **CUSTOMER**  
**JOURNEY** and the  
**OVERALL PERCEPTION** of  
your organization



# Standardize your CX Metrics





Measure  
**SATISFACTION**  
and the  
**DRIVERS** of  
satisfaction



Establish  
BASELINES and  
BENCHMARK





4

# Analyze Employee Engagement





Employee  
Engagement  
defined: The EMOTIONAL  
COMMITMENT one has to  
their organization and  
its goals.



Customers will never  
love the company  
until the employees  
love it first

-Simon Sinek





A close-up photograph of a Black man with a beard and a woman with long brown hair, both wearing business suits. They are looking down at a laptop screen, which is partially visible at the bottom of the frame. The man is smiling slightly. The background is a blurred office environment with blue and white tones.

Get input from

CSRs and

FRONTLINE

MANAGERS





Increased  
EMPLOYEE  
ENGAGEMENT  
drives CX, which  
impacts DESIRED  
OUTCOMES



# 5 Establish/Update Customer Service Standards





Clearly **DEFINE** service standards





Success **REQUIRES DEFINITION**





Set performance  
standards by  
customer TOUCH  
POINT



PUBLISH STANDARDS to  
staff, partners and  
customers





# Successfully MANAGE EXPECTATIONS



press  
bell  
for  
immediate (ish)  
assistance



# 6 Gain INTERNAL ADOPTION





# Identify the primary CX CHAMPION



# Formally EDUCATE Leadership







Host **EDUCATION SESSIONS** for working teams  
and stakeholders...**be inclusive**



Document, Document, Document



A group of five business professionals (three women and two men) are gathered around a round table in a library or study, looking at documents and discussing them. The background is filled with bookshelves. A semi-transparent dark grey banner is overlaid across the middle of the image, containing the text.

Assemble your TEAM and Establish  
CONTINUOUS COLLABORATION

7

Champion  
CUSTOMER INSIGHTS  
to Action

CHANGE  
AHEAD



Identify and **PRIORITIZE** key  
**segments** and  
**opportunities**



# COMMUNICATE and co-create proposed strategy

Runs Scored <sup>2</sup>		WIN %		RECORD	
Runs Scored <sup>2</sup> / Runs Allowed <sup>2</sup> = WIN %		EXPECTED	ACTUAL	EXPECTED	ACTUAL
OAK 2000	$\frac{814^2}{814^2 + 645^2} = \frac{781456}{1197481} = .6525$	.6525	.6296	106-56	102-60
OAK 2002 PROJECTION	$\frac{814^2}{814^2 + 645^2} = \frac{662596}{1078621} = .6143$ + LOSE GIAMBI, DAMON, JARVIS/MAURER	.6143	—	99-63	0-0
SEA 2001	$\frac{927^2}{927^2 + 627^2} = \frac{859329}{1252458} = .6861$	.6861	.7160	111-51	
	$\frac{850^2}{850^2 + 680^2} = \frac{722500}{1184900} = .6097$ + LOSE SELF, BILL — EDGAR AGES	.6097	—	99-63	0
	$\frac{804^2}{804^2 + 713^2} = \frac{646416}{1154785} = .5597$	.5597	.5864	91-71	
	$\frac{890^2}{890^2 + 700^2} = \frac{792100}{1282100} = .6178$ PROJECTION + LOSE JUSTICE, GAIN — GIAMBI, VENTURA	.6178	—	100-62	



# Create a 'TASK FORCE'





Develop a 'Shared Vision' of success





Socialize

DATA/RESULTS



# Use the right PRESENTATION TOOLS





Help Your Data **STAND OUT**





...and Prevent **THIS**  
from Happening...





# **Survey Feedback**

- 50% of new visitors didn't find what they were looking for.
- SAT: 45
- SAT: Down 2 points overall

# **Survey Feedback**

- 50% of new visitors didn't find what they were looking for.
- SAT: 45
- SAT: Down 2 points overall



A middle-aged man with dark hair, wearing a dark suit, white shirt, and patterned tie, is shown from the chest up. He is holding a silver pen in his right hand and looking directly at the camera with a serious expression. The background is a blurred office setting.

Executives don't  
speak “SAT”

They will get this:

“New customer acquisition was down X% during the period due to visitors not being able to find what they were looking for.”



focus on results



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# Thank You

Learn more at:

[www.DaveLewan.com](http://www.DaveLewan.com)