Year One as a Customer Experience Leader

Journey Map and Key Insights Report

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Why we mapped this journey

To understand what is important for a CX leader as they take on a new role

A CX leader's actions during their first 12 months are critical to their ability to drive impact within their organizations. While there is much anecdotal guidance available to these CX leaders as they take on new roles, the CXPA believes this group requires **independent, consensus advice** from other trusted CX leaders over their first year.

To gain knowledge of how best to structure efforts to assist new CX leaders, CXPA—in partnership with Heart of the Customer and Quadient—launched an initiative to map the journey of the CX leader's first year:

GOALS & OBJECTIVES

- Present a balanced, unbiased view of the CX Leader Journey
- Identify of Moments of Truth, friction points, key emotions, and activities that impact a CX Leader's ability to drive change within their organization
- Create an ability to predict a CX Leader's needs along the journey
- Discover content gaps along the journey
- Introduce new initiatives that improve and build a content and resource strategy

THREE KEY QUESTIONS

1. WHO ARE TODAY'S CX LEADERS?
2. WHAT ARE THEY STRUGGLING WITH?
3. WHAT IS KEY TO THEIR SUCCESS?

Who we talked to

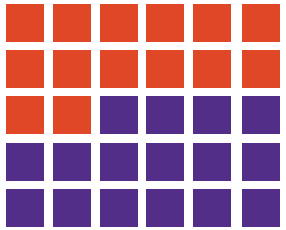
Using Heart of the Customer's research-based approach to customer journey mapping, we conducted 45-minute, one-on-one interviews virtually with 28 CX leaders across 19 industries who:

Were responsible for the strategy and direction of their CX program at their organization

Started in their role between August 2019 and October 2021

Participants were either promoted from within their organization or hired from a pool of external applicants. They had varying levels of CX experience and represented many different industries.

THE CX LEADERS



12 INTERNAL HIRES

16 EXTERNAL HIRES

28
TOTAL INTERVIEWS

CX LEADERS BY GENDER

MALE	FEMALE
46%	54%

45 Minutes
AVERAGE INTERVIEW TIME

CX LEADER JOB TITLES

CX LEAD • SENIOR DIRECTOR • CUSTOMER INSIGHTS MANAGER • SENIOR VP OF CX • MANAGER OF QUALITY & EXPERIENCE • DIRECTOR OF MEMBER EXPERIENCE • DIRECTOR OF CX • DIRECTOR OF CX & RETENTION • SENIOR DIRECTOR OF CX • CUSTOMER EXPERIENCE MANAGER • VOICE OF CUSTOMER DIRECTOR • VP OF CLIENT EXPERIENCE • GLOBAL CUSTOMER QUALITY MANAGER • DIRECTOR OF CX STRATEGIES & SOLUTIONS • CX PROGRAM MANAGER • PROGRAM MANAGER OF CX INSIGHTS • VP OF EXPERIENCE MANAGEMENT • DIRECTOR OF CUSTOMER SERVICE PARTNERSHIPS • DIRECTOR OF VOC EXPERIENCE • MEMBERSHIP EXPERIENCE MANAGER • DIRECTOR OF CLIENT RELATIONSHIPS • DIRECTOR OF CUSTOMER EXPERIENCE • MANAGER OF GUEST INSIGHTS • DIRECTOR OF CONSUMER EXPERIENCE

NUMBER OF INTERVIEWS BY INDUSTRY

1

BIOTECHNOLOGY • CONSTRUCTION • CONSULTING • DISTRIBUTION • EDUCATION • ENGINEERING • GOVERNMENT• MANUFACTURING • NON-PROFIT • PROPERTY MANAGEMENT • RECRUITING • RENTAL • RETAIL • SAAS • UTILITY

2

BANKING • FINANCIAL • HEALTHCARE • SOFTWARE • TECHNOLOGY

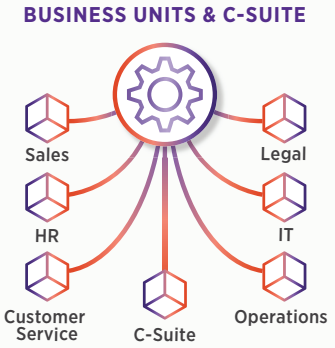
3

INSURANCE

One year—two paths

The CX leader personas

CX LEADERS REQUIRE A GROUP OF CROSS-FUNCTIONAL LEADERS IN ORDER TO EFFECTIVELY DRIVE CHANGE

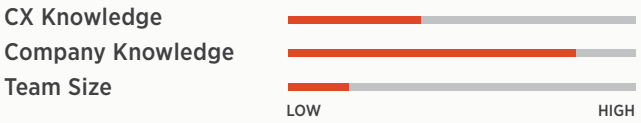


Inside Track Isaac

- Worked for current company in various roles for 8 years
- Has passion for the customer, but limited training

"I am pioneering this role, not only for myself, but also for my company."

Isaac's Differentiators



GOALS | Revitalize or Build a CX Function | Drive Change | Gain Company-Wide Support

External Hire Erica

- Background in market research before obtaining CCXP
- Led teams 10+ years, now up for a new opportunity

"This new role is an opportunity to build a program from the ground up, the right way."

Erica's Differentiators

Guiding an Organization Down a New CX Path

CX Leaders: Reviewing Year One

CX leaders told us about their key experiences, considerations, partners, activities, and questions. Using that information, we created this map to serve as a resource to set up new CX leaders and their organizations for success.

Inside Track
ISAAC

- Worked for current company in various roles for 8 years
- Has passion for the customer, but limited formal training

CX Knowledge
Company Knowledge
Team Size
LOW HIGH

"I am pioneering this role, not only for myself, but also for my company."

External Hire
ERICA

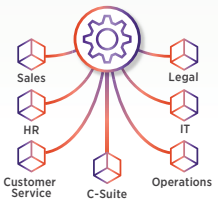
- Background in market research before obtaining CCXP
- Led CX teams 10+ years, now up for a new opportunity

CX Knowledge
Company Knowledge
Team Size
LOW HIGH

"This new role is an opportunity to build a program from the ground up, the right way."

GOALS | Revitalize or Build a CX Function | Drive Change | Gain Company-Wide Support

Business Units & C-Suite



Legend

- **Moment of Truth** | Activity that has a disproportionate impact on the journey.
- **Friction Point** | Activity that provokes negative emotions during the journey.
- Activity
- Alignment
- Data
- Change Management

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Heart of the Customer

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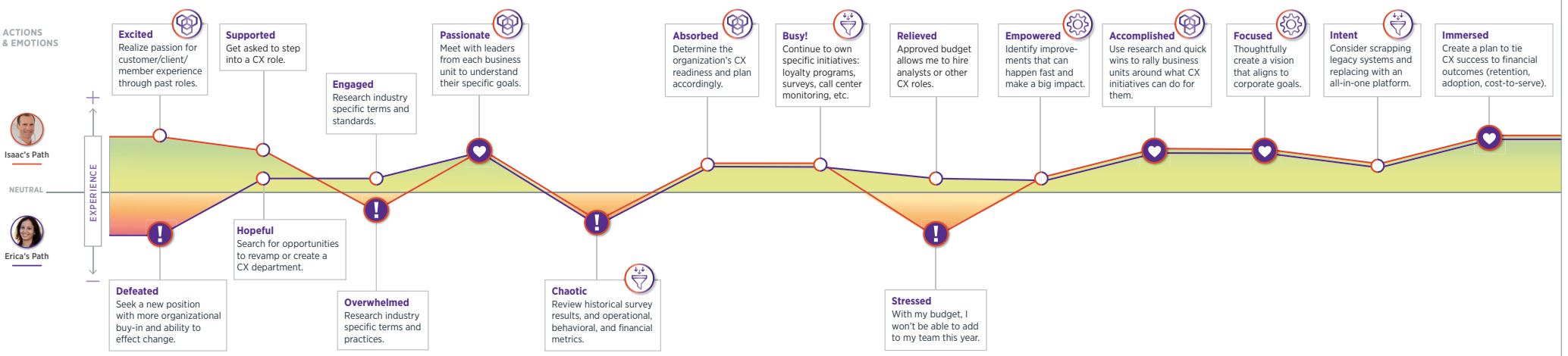
PHASES	Land the Job	Familiarize & Acclimate	Socialize	Strategize
TIMELINE	BEFORE YEAR ONE	FIRST 6 MONTHS	NEXT 3 MONTHS	NEXT 3 MONTHS
STEPS	Seek or Get Offered New Position; Go Through Interview Process	Get up to Speed; Meet With Stakeholders; Review Existing Data; Conduct Maturity Assessment; Handle Immediate Business Needs	Build Team; Plan Quick Wins; Present Data (Qual and Quant)	Create Long-Term Strategy; Evaluate Existing / Bring on New Tech; Set Goal to Tie Customer Improvements to ROI
OBJECTIVES	Identify role that fits my unique skill set and passions • Seek opportunity to revitalize or build new CX function	Set up or keep elements of the CX program functioning • Build out plan for the year Determine how leaders like to receive data (charts, dashboards, verbatims, storytelling, etc.)	Show leaders the potential and value of CX Teach other business units how they can utilize the CX team	Finish laying foundation for CX so that program is scalable and results measurable

ACTIONS & EMOTIONS



Toolbox

ADVICE from PEERS

- It is never too early to start! Listen for leadership buy-in during interviews or before agreeing to step into a new CX role.
- Never decline an invite; schedule interviews with as many stakeholders as you can. Take your time to make sure things are set up correctly, including a formal governance structure. Avoid a 'break-fix' mentality and instead intentionally design experiences.
- Use creative storytelling with both qualitative and quantitative data. Celebrate early victories or quick wins, and socialize your program. Search for team members with a passion for the customer—don't disqualify candidates without past CX experience.
- Set a formal long-term strategy that is aligned with corporate goals. Gather base line measurements so you can prove ROI later on.

QUESTIONS to ASK

- Do I have budget to build a team?
- What are your top priorities and how can I help? • What is our organization's CX readiness? What do we already know about our customers?
- What can we easily fix to make the biggest impact now? Are my leaders motivated by numbers or stories?
- How can CX help further company goals? Will our current tools and technology scale to meet business needs?

RESOURCES

NETWORKING

CXPA • LinkedIn • Personal Network
Affinity Groups (e.g., Women in CX)

PUBLICATIONS

Chief Customer Officer 2.0 • How Hard Is It to Be Your Customer? • Outside In • The Effortless Experience
The First 90 Days • The Ultimate Question 2.0

TECHNOLOGY

Adobe Experience Manager • Clarabridge • Domo • Gainsight
Glint • Medallia • Miro • Notion • Press Ganey • Quadient • Salesforce
Survey Monkey • Tableau • Typeform • Zendesk • Zoho

CONSULTING SERVICES

Forrester • Gartner • Qualtrics

Journey phase 1

Land the job

Before the first year officially begins, leaders must identify a role that fits their passions and skill set, and is the right opportunity for them at this time.

Legend

Moment of Truth | Activity that has a disproportionate impact on the journey.

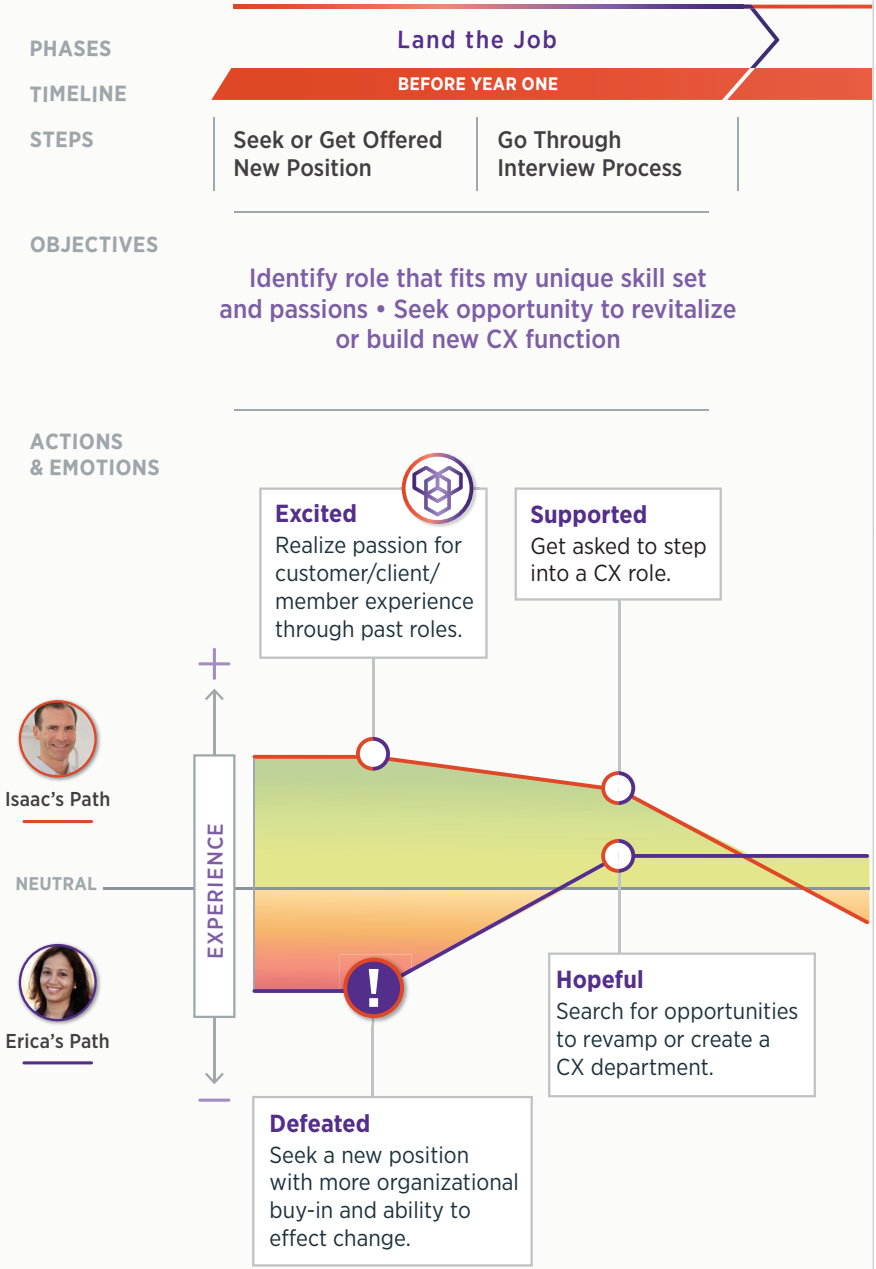
Friction Point | Activity that provokes negative emotions during the journey.

Activity

Alignment

Data

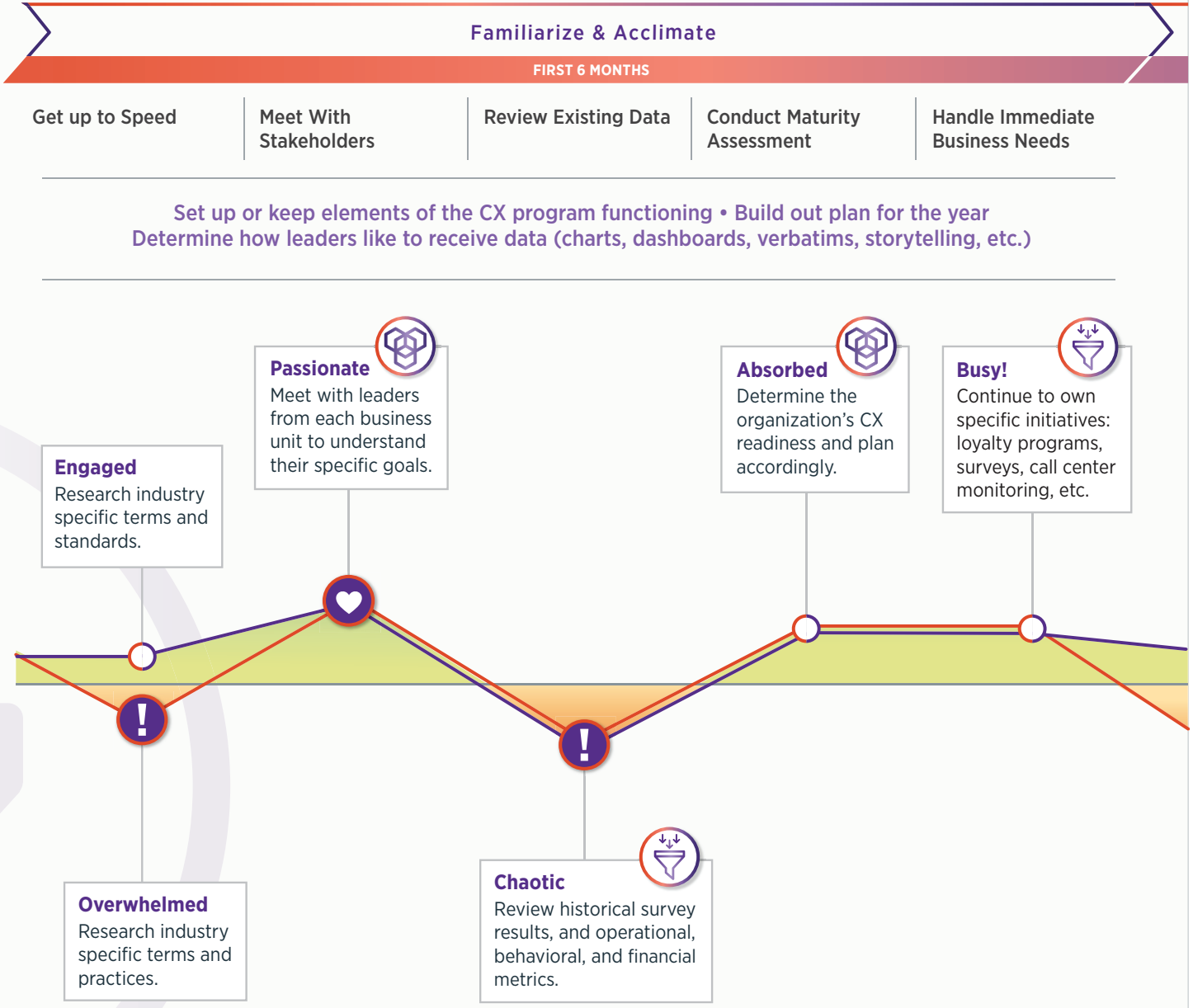
Change Management



Journey phase 2

Familiarize & acclimate

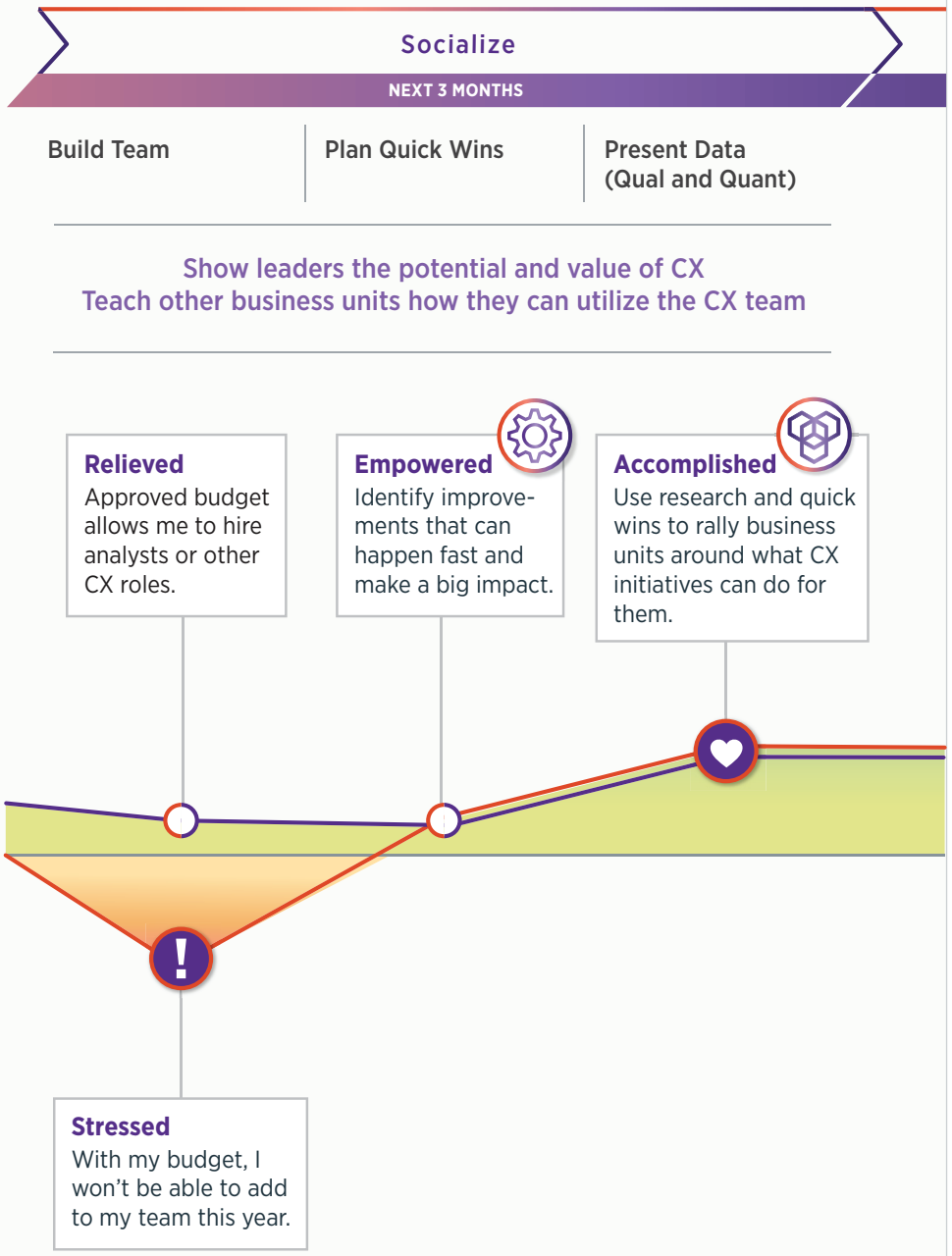
Whether building a new program from scratch or stepping into an existing framework, first leaders must plan out their year and meet with leadership.



Journey phase 3

Socialize

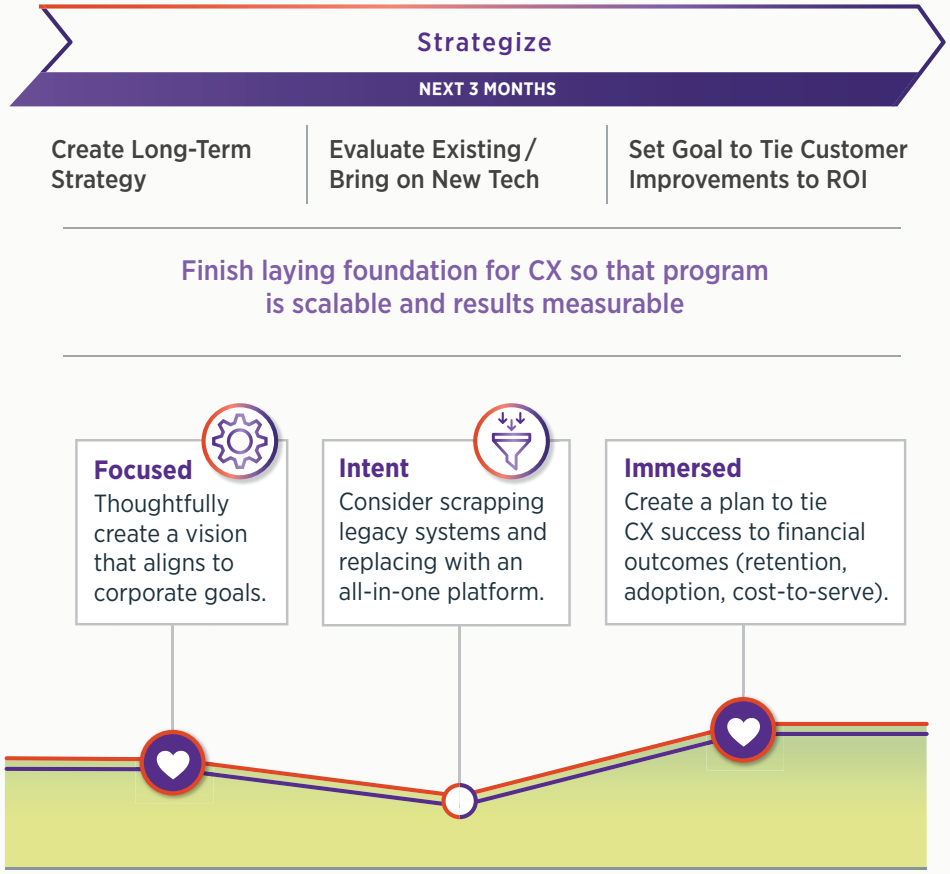
Building out a team, and showing other business units and leaders how CX can help them or be utilized, is an important next step.



Journey phase 4

Strategize

Finally, leaders create long-term strategies and finish laying the foundation to end their first year, with a keen eye on scalability and measurable results.



CX Leaders: Reviewing Year One

MOTs & Friction Points

MOMENT OF TRUTH OR FRICTION POINT	CX LEADER QUOTES
LAND THE JOB: SEEK OR GET OFFERED NEW POSITION	**CX LEADER QUOTE** **I was doing the work of like five people and it just, it burned me out.** It wore me out really quickly. So when I knew it was time to look for something different, I was specifically targeting insurance and healthcare because of my own personal journeys that I've had in life.
FAMILIARIZE & ACCLIMATE: GET UP TO SPEED	**CX LEADER QUOTE** I had a lot of support from the CEO because it was his idea and he gave me a lot of freedom. **So I just started researching "what is customer experience."** I knew it was a hot topic and something that was really popular. **That's when I found out how much of a role it plays in the organization becoming customer-centric.**
FAMILIARIZE & ACCLIMATE: MEET WITH STAKEHOLDERS	**CX LEADER QUOTE** The next step is **figuring out who leads and who can influence parts of the organization**. Whether it be product price, or interaction experience, or brand perception. Who has the most impact to start to develop change or get insights. **It's really understanding the business, then understanding the people, and I guess, the next steps.**
FAMILIARIZE & ACCLIMATE: REVIEW EXISTING DATA	**CX LEADER QUOTE** The challenge is that **a lot of that data is hard to find**. Especially in a medium-sized company like this, where we've had huge amounts of change and we've had siloed data. That is somebody's livelihood and they own that data. **They're not gonna share it unless you can prove that you're an ally.**

MOMENT OF TRUTH OR FRICTION POINT	CX LEADER OBJECTIVES & THOUGHTS (OR QUOTE
SOCIALIZE: BUILD TEAM	**CX LEADER QUOTE** We don't really have a great reporting structure for CX. **I don't have any direct reports.** I do work with a colleague who does some quality assurance, she sends NPS surveys.
SOCIALIZE: PRESENT DATA	**CX LEADER QUOTE** Whatever research technique we're doing I ask,"Can we get the audience who will be receiving these findings to hear the customer talking first hand?" **The highest ability to influence is through video clips, quotes, testimonials, artifacts of any sort, that show how a customer behaves** in the process, and the emotions that come with them.
STRATEGIZE: CREATE LONG-TERM STRATEGY	**CX LEADER QUOTE** We have a strategy workshop with the board, with the leadership team. Together we'll develop a CX strategy across all divisions. **I will embed this work into a customer experience vision across all the entities. So it has to be one hundred percent aligned.** I'm using the strategy workshop to define a customer experience vision.
STRATEGIZE: SET GOAL TO ROI	**CX LEADER QUOTE** We wanted to continue to move the needle...but **I think now that we have gotten to understand the ROI financially, that's going to become something that our leadership team is keen to continue to understand** and set goals towards.

QUESTION 1

Who are today's CX leaders?

They are passionate

Deep empathy for customer, client, patient, and /or member runs deep and comes naturally.

Passion can cause self-induced pressure and stress, leading to burnout.

> **I have been a champion for the customer for a very long time. And that is something that I decided to focus most of my professional experience towards. That is one of the reasons why I continue to educate myself in this space.**

They won't settle for the status quo

Lofty goals are appropriate for leaders charged with starting or revitalizing a CX function.

> **One thing I mentioned is, "Be bold." I think one of the things we're afraid to do in CX, it's like, "Oh, we're the nice guys. We shouldn't talk about that." I will flat out say, "Well, do you want us to keep our customers?"**

They forge their own paths

To get to where they are today, there are some common pathways, but many have diverse professional backgrounds.

Once they have the job, they must also create their own paths.

> **I remember feeling super excited about stepping into something, but then also extremely scared because no one in my organization I could look at and lean on and say, "Hey, how did you do this?"**

QUESTION 2

What are they struggling with?

Small teams...but lots to do

Many CXers have small teams. In fact, adding headcount (and budget) was often a top priority.

As a result, it can feel lonely if you don't look beyond your team to build trust.

> **Usually CX people are either individual contributors or maybe they have like one or two other people on a team. So be sure that you're staying connected to people outside your organization.**

Whack-a-mole problem solving

CX teams can be pulled in many directions and have to deal with competing priorities.

Taking a more intentional approach, designing experiences was seen as the better path.

> **We're excellent at firefighting. It's trying to get more proactive about things trying to figure out and less of that kind of gut feel and trying to get to the true feelings that customers have.**

Plenty of influence, little ownership

The CX function commonly feels like more of an internal consultant.

How much influence a CX leader can expect to wield depends on support and buy-in from executives.

> **I think that what we've shown is that it should be everyone's responsibility. And that we need to be able to build those capabilities across so that everyone is empowered to be able to drive forward.**

QUESTION 3

What is key to their success?

Socialization & communication

Seemingly endless stakeholder interviews are paramount to understand and be aligned with goals, and how to speak the language of leaders.

CX leaders are also continuously tasked with educating and selling their work across the organization.

Using change management to make CX a team sport

Some are lucky enough to have certified change management experts on-site, others embed change management strategies into their practice.

They forge their own paths

Though not expected or actualized in the first year, leaders know that they will eventually be expected to show value.

> **Each group might have their own perspective of what's important and what's not. I was really focused on aligned the organization, trying ot get some momentum, some enthusiasm.**

> **You look at the ADKAR model or anything that you do to assess change. I always look at how much awareness is there and how much knowledge is there of both the practice and what we can help teams with.**

> **Connecting to dollars is coming. That's something that I see as really important for our program to continue to demonstrate that there's value to what we're doing with all of these programs.**

Our team

CXPA | Customer Expericence Professionals Association

Founded in 2011, the Customer Experience Professionals Association is the premier global nonprofit organization dedicated to the advancement and cultivation of the Customer Experience profession. Its mission is to support CX professionals to share, learn, inspire and grow throughout their entire career, in service to a vision of exceptional outcomes inspired by empowered CX professionals.

Quadient

Quadient is the driving force behind the world's most meaningful customer experiences. By focusing on Intelligent Communication Automation, Parcel Locker Solutions and Mail-Related Solutions. Quadient helps hundreds of thousands of customers worldwide simplify the connection between people and what matters.

Heart of the Customer

Heart of the Customer is a results-focused customer experience consultancy setting best-practice journey mapping standards since 2013. Our experienced team delivers next-generation best practices that go beyond insights and recommendations to empower and activate organizations to generate customer-driven value and bottom-line growth.

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