

# 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



**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



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

## Business Units & C-Suite



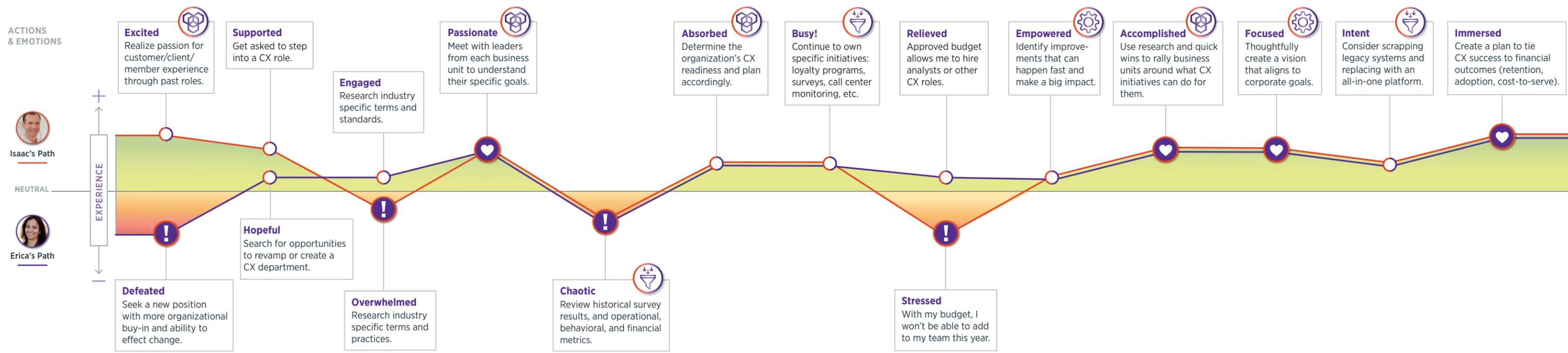
## Legend

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

©2022 CXPA | Produced May 2022 by Heart of the Customer

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

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



ADVICE from PEERS	QUESTIONS to ASK	RESOURCES
<p>It is never too early to start! Listen for leadership buy-in during interviews or before agreeing to step into a new CX role.</p> <p>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.</p> <p>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.</p> <p>Set a formal long-term strategy that is aligned with corporate goals. Gather base line measurements so you can prove ROI later on.</p>	<p>Do I have budget to build a team?</p> <p>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?</p> <p>What can we easily fix to make the biggest impact now? Are my leaders motivated by numbers or stories?</p> <p>How can CX help further company goals? Will our current tools and technology scale to meet business needs?</p>	<p>CXPA • LinkedIn • Personal Network Affinity Groups (e.g., Women in CX)</p> <p>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</p> <p>Adobe Experience Manager • Clarabridge • Domo • Gainsight Glint • Medallia • Miro • Notion • Press Ganey • Quadiant • Salesforce Survey Monkey • Tableau • Typeform • Zendesk • Zoho</p> <p>Forrester • Gartner • Qualtrics</p>
<b>NETWORKING</b>	<b>PUBLICATIONS</b>	<b>TECHNOLOGY</b>
		<b>CONSULTING SERVICES</b>

Toolbox