

KEY PITFALLS TO AVOID DURING THE EXPANDING LEVEL OF CX TRANSFORMATION

CEOs need to direct both the expansion and acceleration of CX Transformation.

The purpose of the Level 2/Expanding Level is to grow CX transformation efforts across the brand. The success of the expansion process is strongly connected to the learnings acquired by the brand as they navigated through the Level 1/Beginning Level. These learnings must be smartly applied to:

1. **Expand** the scope of CX Transformation efforts and;
2. **Accelerate** the pace of CX Transformation efforts.

This expansion process is about tackling a more complex department to initiate CX Transformation. This usually involves **expanding efforts** to a new multi-dimensional department such as sales/marketing which contains multiple moving parts where many simultaneous uncoordinated efforts are taking place involving many customer touchpoints.

It is important to plan ahead and anticipate possible roadblocks based on the experiences encountered during the Beginning Level and to proactively plan for overcoming them. It is this foresight that will help drive the **accelerated pace** of CX Transformation efforts.

CHANGES IN A BRAND'S CX ACTIVITIES TAKING PLACE DURING EXPANSION LEVEL



supported customer data. This is because from the Beginning to the Expanding Level **the use of customer data to drive business decisions will also increase** dramatically (+20 pts).

Out of the Expanding Level will come improved alignment between brand actions and customer needs, wants and desires. **The brand's revenue performance will improve slightly** as knowledge about customers, the brand's operations and its employees expands.

TEN-POW TIP #1: The CEO must prioritize expenditure on data collection at the Expanding Level. At this level the CEO will be inundated with many requests to fund different initiatives around CX Transformation. There will be requests to build data warehouses or data lakes and to undertake other expansive projects. However, the CEO must prioritize the collection of data around customer sales and support and deepening the knowledge about the customer's journey. It is important to stay focused on the most important tasks and not diversify efforts too quickly because engaging in activities at the wrong time will interfere with the efficiency of the CX Transformation process.

TEN-POW TIP #2: At the Expanding Level the CEO must demand the creation of a defined process for implementing improvements based on customer data collected and the associated knowledge acquired. It is easy to get excited about the mountains of new data collected. However, this influx of data can both accelerate or derail CX Transformation efforts because the brand becomes hyper-focused on data collection and neglects to follow through with customer-data derived actions. To ensure the brand doesn't fall into this trap the CEO must set guidelines that compel employees to take action based on new customer knowledge.

TEN-POW TIP #3: Pay attention to employee happiness. As CX Transformation expands and accelerates important CX knowledge will be acquired across the brand. Whereas the CEO was focused primarily on a customer happiness metrics at the Beginning Level, attention must now also be paid to employee happiness and other wellness indicators at the Expanding Level. It is important that the brand does not lose momentum because of key employee departures during this period because as CX knowledge leaves transformation will slow. This is why it is particularly important to create a measure for organization health and add this metric to the list of key KPIs and to ensure this measure is on the upswing as the brand navigates the Expanding Level.

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