Welcome!

Strategies & Leadership Forum: Connecting Customer Experience & Employee Experience to Drive Better Business Results

How "Human Factors" & Employee Experience (EX) can directly impact your Customer Experience (CX) and Business ROI

Exclusive Underwriter

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online business systems

Association Partner

#TechExecs
TechExecs Network
FOUNDED IN 1999
Celebrating 20 years of successful Leadership Events!

Monica MacKay
*Partner, Engagement Leader
at Disrupt Idea Co.*

Kevin Sigmundson
*Senior Director, Digital Studio
at Online Business Systems*

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Industry Update & Fireside Chat

KEYNOTE

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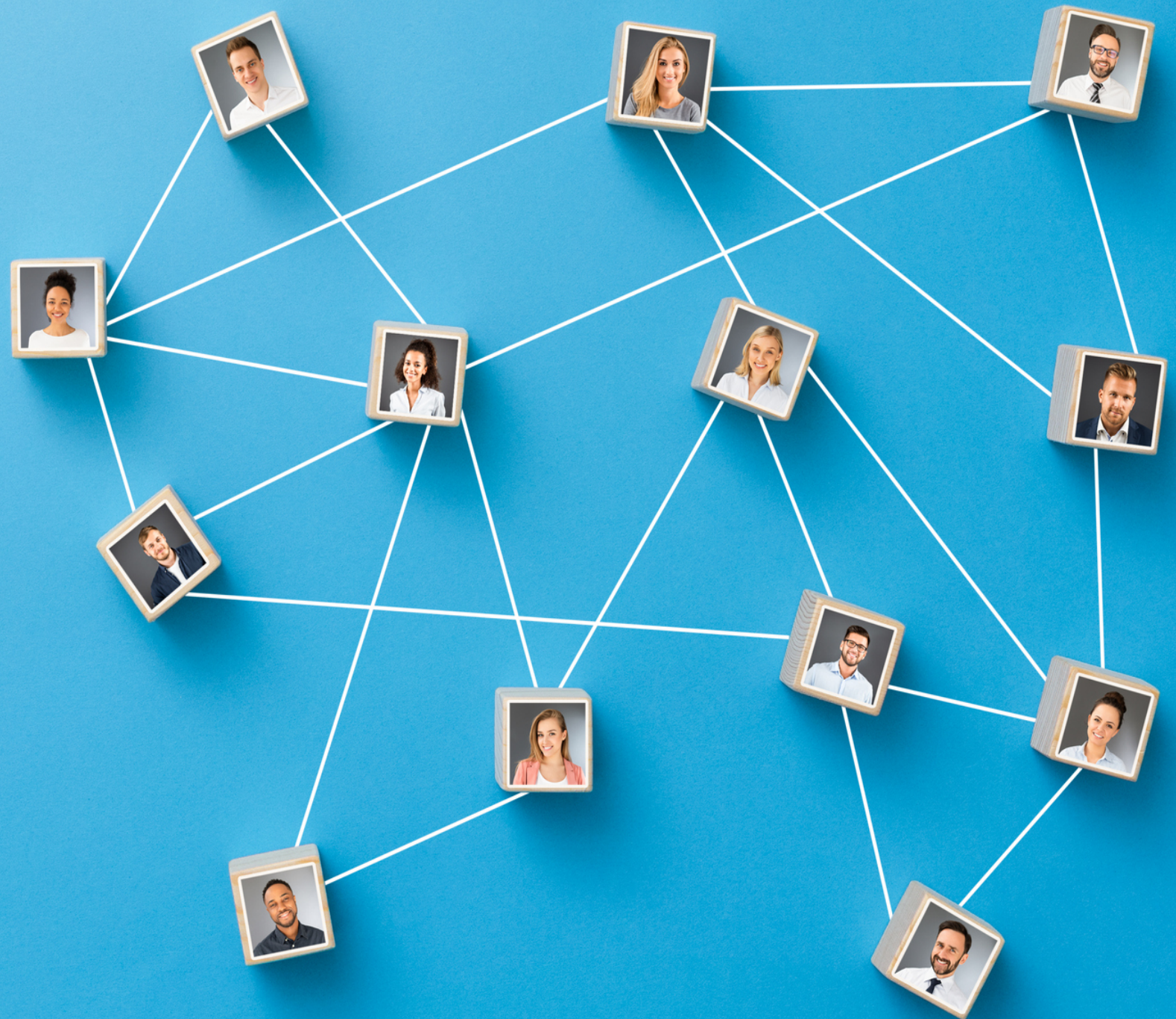*at Online Business Systems*

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Connecting Customer and Employee Experience

Diane Magers, CCXP, MS, MBA
Experience Catalysts

Linking Employees and Customer Experience to Business Results

68%
...of customers LEAVE because of poor employee attitude

Source: Parkington and Buxton, Study of the US Banking Sector, Journal of Applied Psychologyy

41%
...of customers are LOYAL because of a good employee attitude

Source: MCA Brand Ambassador Benchmark

70%
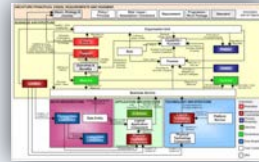...of customer brand perception is determined by experiences with PEOPLE

Source: Ken Irons, Market Leader

Experience Management Lens

Enabling the Engagement Ecosystem™

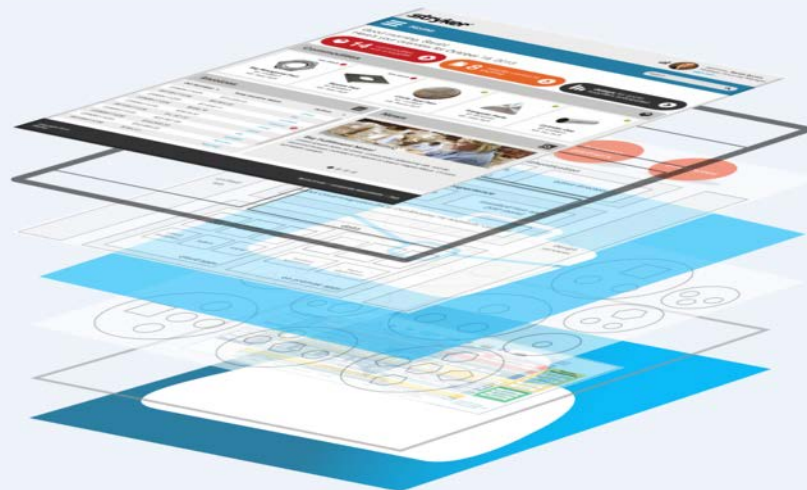# Holistic design of the Engagement Ecosystem

Ecosystem experience journey (customer, employee, partner)

Internal capabilities, workflows, processes, culture

User experience

Digital experience

Tech/data/architecture

As employees, we expect and want engagement and connection at work

Engaged	want to be involved, consulted, provide ideas
Personal	want 1:1 experiences and support, personal growth
Valued	empowered, recognized, rewarded
Purpose	make a difference, give back, contribute

Engagement is an outcome of the experience

Employee Experience is the sum of the various perceptions employees have about their interactions with the organization in which they work.

EX is the totality of an employee's experiences, so it encompasses all of the narrower aspects of how an employee perceives their everyday life at the office, both good and bad.

Employee engagement is a workplace approach resulting in the right conditions for all members of an organization to give of their best each day, committed to their organization's goals and values, motivated to contribute to organizational success, with an enhanced sense of their own well-being.

Beyond the Bagels

A new approach beckons
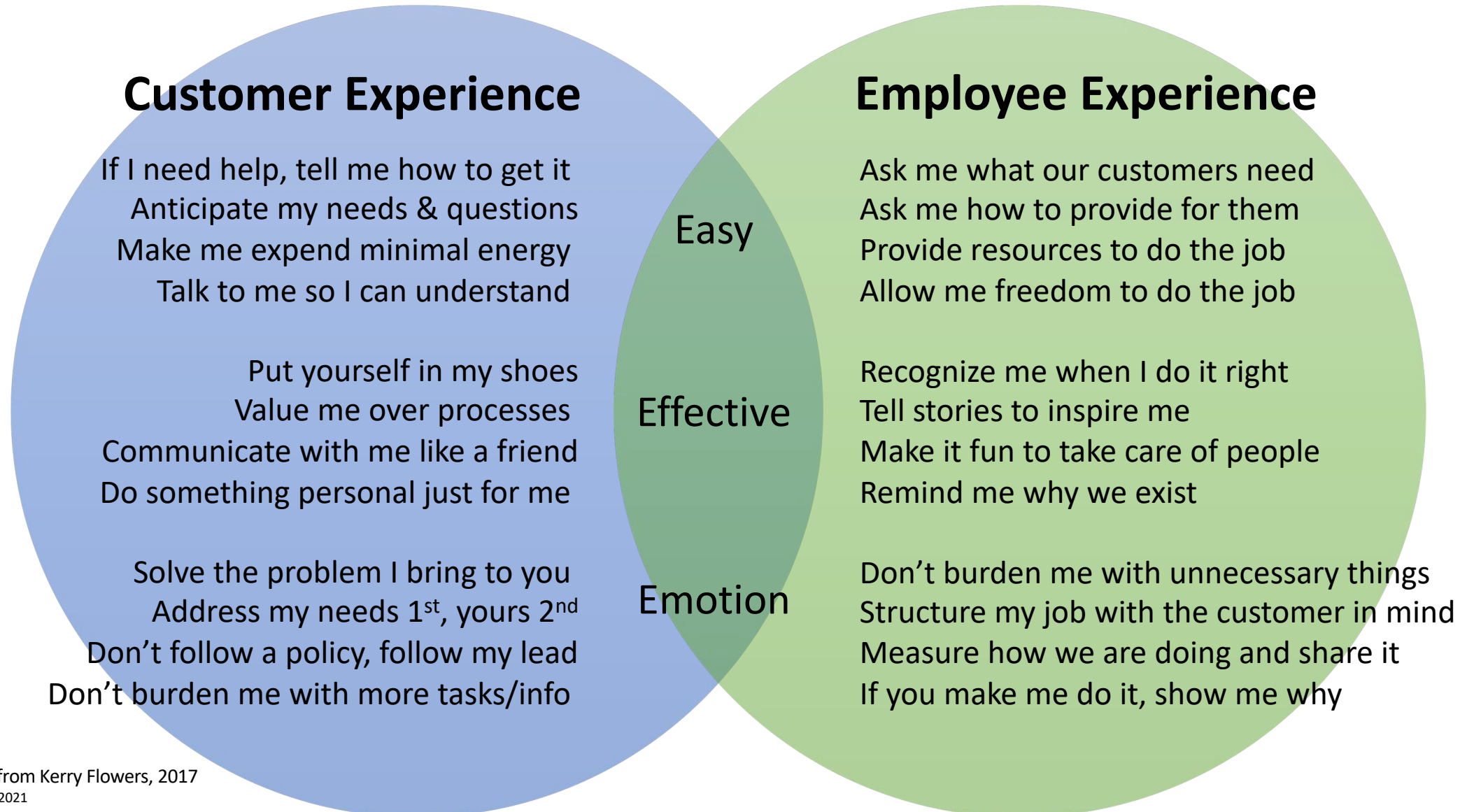
Typical Employee Experience Approach

- "The Adrenaline Shot" after the annual survey

- One-size fits all approach across enterprise

- Dispersed (if any) action plans

- Limited / no linkage to business metrics or outcome

- Activity-based and compliance-driven progress monitoring of engagement program and outcome
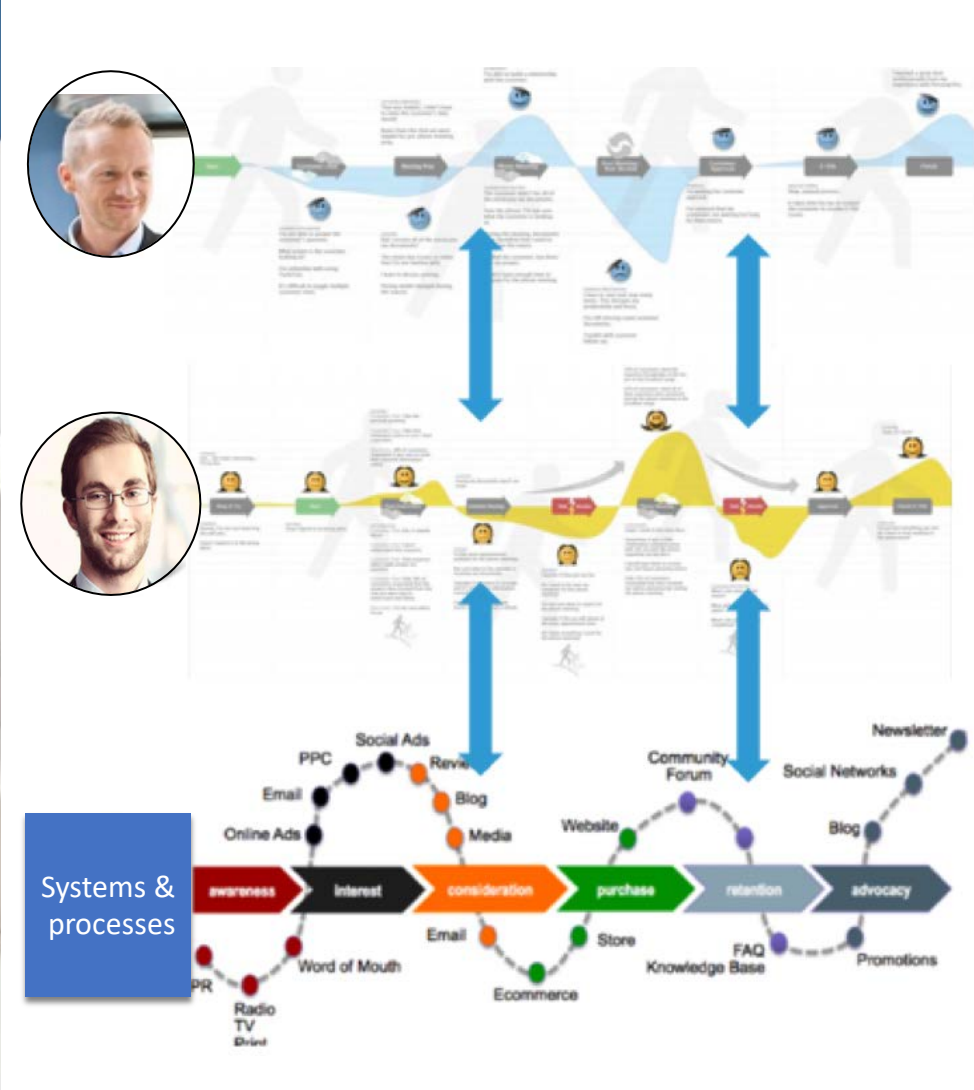
Experience & Engagement Transformation

- "Design thinking" driven employee experience blueprint

- Identifies, designs and tracks opportunities with orchestrated cross team ownership

- Segment/persona-based approaches for different employee segments

- Integrate feedback and design with customer's

- Prove ROI with high engagement and lower turnover AND impact to customer experience

Shift the Perspective

Customer Experience

If I need help, tell me how to get it
Anticipate my needs & questions
Make me expend minimal energy
Talk to me so I can understand

Put yourself in my shoes
Value me over processes
Communicate with me like a friend
Do something personal just for me

Solve the problem I bring to you
Address my needs 1st, yours 2nd
Don't follow a policy, follow my lead
Don't burden me with more tasks/info

Easy

Effective

Emotion

Employee Experience

Ask me what our customers need
Ask me how to provide for them
Provide resources to do the job
Allow me freedom to do the job

Recognize me when I do it right
Tell stories to inspire me
Make it fun to take care of people
Remind me why we exist

Don't burden me with unnecessary things
Structure my job with the customer in mind
Measure how we are doing and share it
If you make me do it, show me why

Source: Adapted from Kerry Flowers, 2017
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Systems & processes

Experience are interdependent

They have their own journey

RECRUITING-TO-JOB OFFER → ONBOARDING & TRAINING → "DOING MY JOB" → PERFORMANCE FEEDBACK & EVALUATION → CAREER MANAGEMENT

TRIGGER:
- Friends
- Job board email
- Fed up at old job

APPLICATION
- LinkedIn!
- Resume upload
- Manual entry

They want to meet me!

I got the job!

INTERVIEW & OFFER
- Preparation / guidance
- Interview facilitation
- Feedback
- Offer decision

ONBOARDING PAPERWORK
- W-4
- Employee Handbook
- Email/password
- Benefits

FIRST DAY
- Office & Equipment
- Online setup
- Job training

FIRST 90 DAYS
- Onboarding schedule
- Feedback & coaching
- Peer/culture acclimation

COMPANY ADMIN.

Enablers: % positive
- Clear goals: 61%
- Manager Support: 56%
- Resources to do job: 55%

Barriers: % negative
- Training & Coaching: 26%
- Dynamic goal setting: 50%

Enablers: % positive
- Competitive   76%
  Compensation
- PTO/Vacation: 67%
- Benefits: 58%
- Expense Mgmt.:   58%

Enablers: % positive
- Objective Perf. Assessment: 61%
- Applying new skills on job: 58%
- Colleague Feedback: 50%
- Performance Eval.:   50%
- Access to training: 49%

You are doing great!

Barriers: % negative
- Practical Dev. Plan: 31%
- OJ-coaching: 27%
- Objective Skills assessment: 24%

I got promoted!

eNPS+1

Barriers: % negative
- Career Coaching / Mentoring 39%
- Visibility to career options: 34%
- Practical Dev. Plan: 31%
- Career Path defined: 30%
- Effective job transitions   24%

I'm outta here!

MOMENTS OF TRUTH:

Enjoyment (1-10 scale)

Happy / Neutral / Unhappy								
6.0	6.6	6.3	7.2	7.2	5.9	5.9	5.5	5.2
CATALYST	INTERVIEW/OFFER	ON-BOARDING	JOB EXECUTION	COMPANY ADMIN.	PERFORMANCE FEEDBACK	PERFORMANCE EVALUATION	TRAINING & DEVELOPMENT	CAREER PLANNING

PAIN POINTS:

- Difficult Job Portal
- Unclear Position description
- Manual Forms to Accept job
- Poor Interview feedback

- Wait for Equipment
- Lag for Training
- OJT-only Training

- Lack of trust / empowerment
- Inflexible goals
- Lack of training/coaching

- Unskilled Coaching
- Lack of a clear dev. Plan
- Subjective evaluation

- No career path
- Lack of visibility of career options (internal or external)
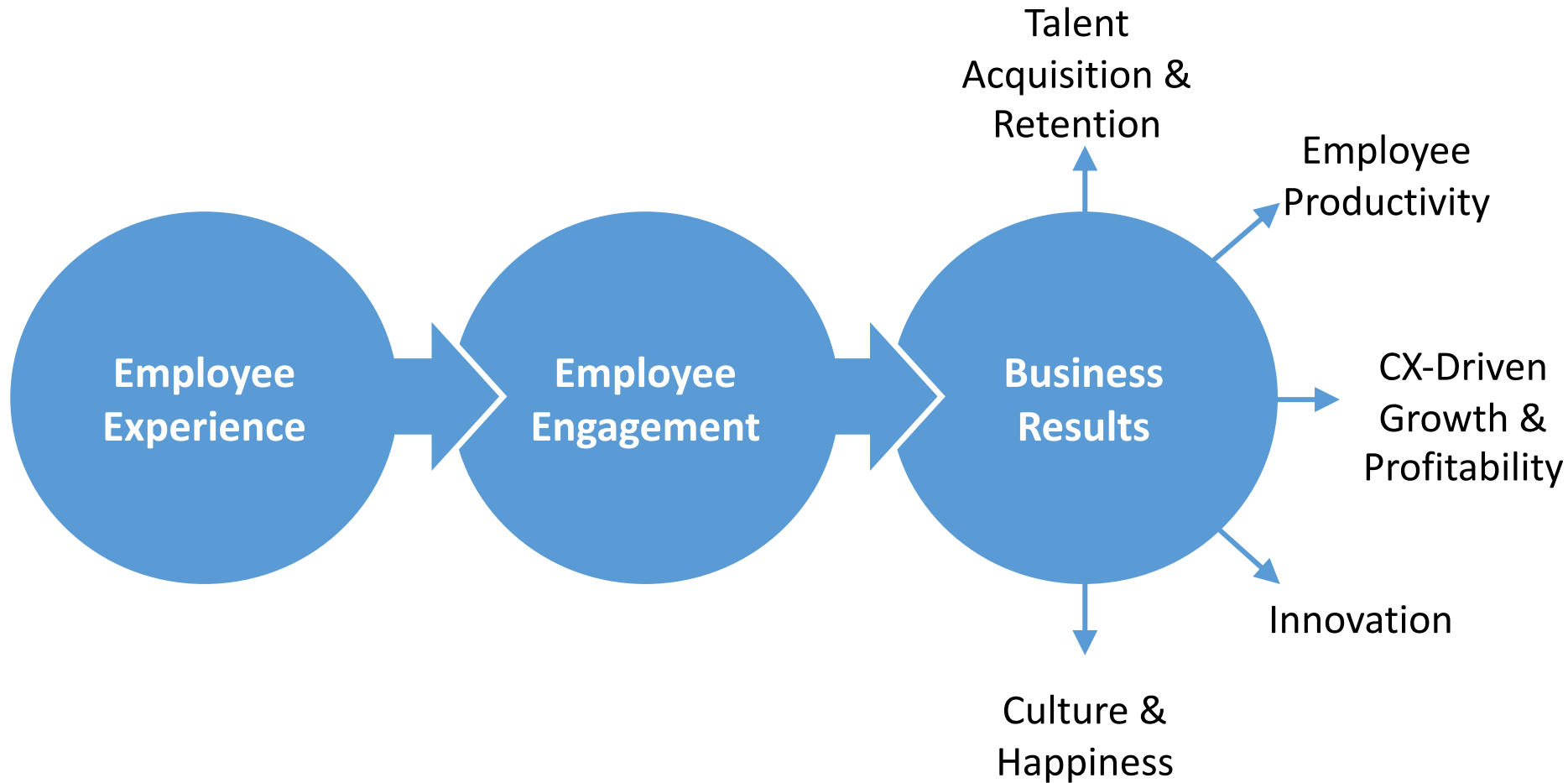- Poor career mentoring

Connecting Employee and Customer Journeys

- How does the employee experience impact the customer ?

- What hurdles to employees face when trying to service the customer?

- What are employees experiencing and feeling while trying to complete a task?

- Where are the gaps between departments?

- Where are the opportunities to make the process more efficient, pleasurable and profitable?

- How can we use technology/digital ?
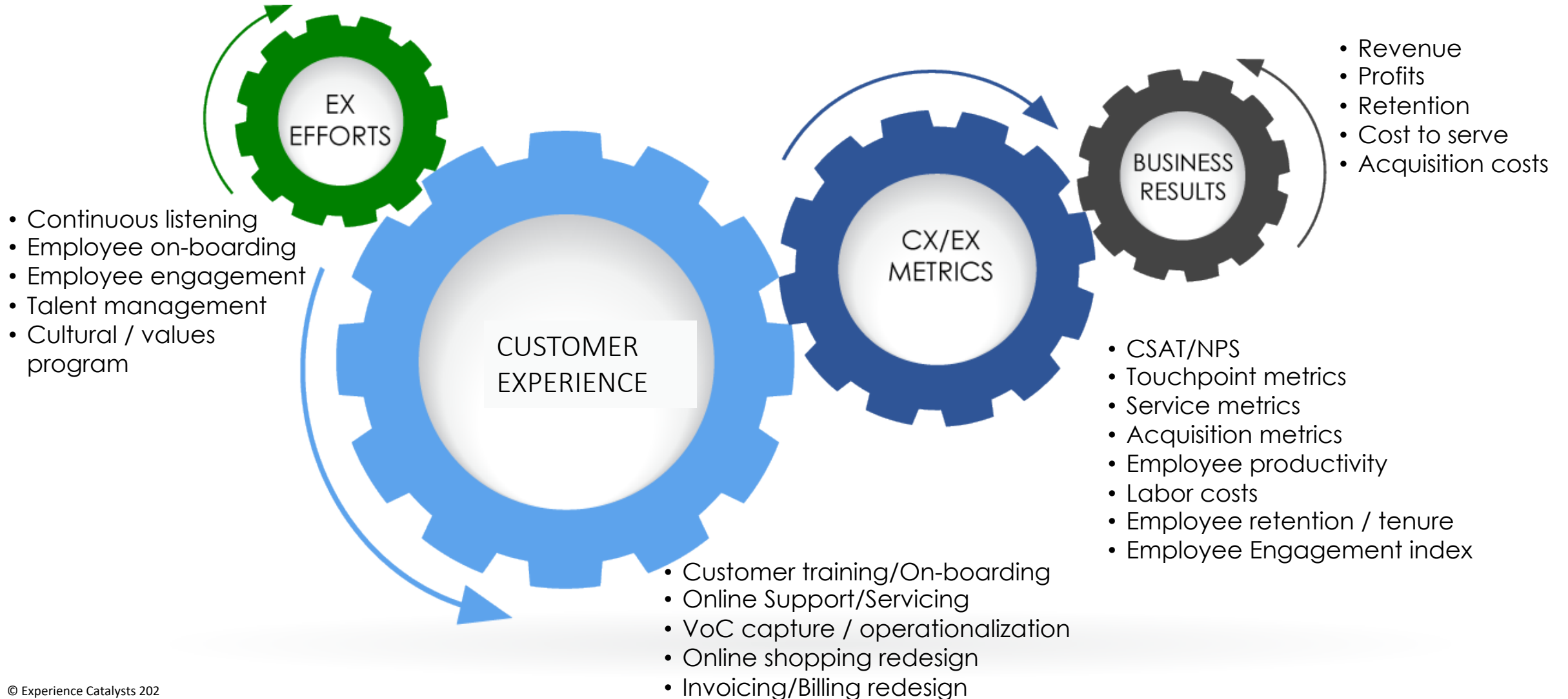
Types of Value from Employee Experience Improvements

Employee Experience → Employee Engagement → Business Results

- Talent Acquisition & Retention
- Employee Productivity
- CX-Driven Growth & Profitability
- Innovation
- Culture & Happiness

EX Examples:

- Productivity/person
- Manpower cost/person
- Training costs/person
- Cost of Attrition
- Cost of Recruitment
- Loss of Days per year

Adapted from Employee Experience Advantage, Jacob Morgan, 2020

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Redesigning customer and employee journeys

- Raises customer-satisfaction scores by <u>15 to 20 points</u>

- Reduces costs to serve by <u>15 to 20 %</u>

- Boosts <u>employee engagement by 20 %.</u>

ROX: Return on Experience

EX EFFORTS
- Continuous listening
- Employee on-boarding
- Employee engagement
- Talent management
- Cultural / values program

CUSTOMER EXPERIENCE
- Customer training/On-boarding
- Online Support/Servicing
- VoC capture / operationalization
- Online shopping redesign
- Invoicing/Billing redesign

CX/EX METRICS
- CSAT/NPS
- Touchpoint metrics
- Service metrics
- Acquisition metrics
- Employee productivity
- Labor costs
- Employee retention / tenure
- Employee Engagement index

BUSINESS RESULTS
- Revenue
- Profits
- Retention
- Cost to serve
- Acquisition costs

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Purposeful intent to shift

Experience design at the center of change

Ways of Working

Always on Conversation and Involvement

New capabilities, skills, empowerment

Co-creation

Customers and employees are actively involved in creating rich experiences

To Create an Experience…

Don't think about what to <u>get</u> from employees, think about what to *give* them – so they can achieve *their* goals.

…focus on influencing specific behaviors that drive results – for them and the business…
"Outcomes Driven"

…create a meaningful, memorable, and differentiated experience…
"Signature Experience"

…deliver it in a way that builds a strong emotional bond with employees…
"Empathically Delivered"

Southwest Airlines Mission:

Dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company Spirit.

Experience Maturity Model Framework

Exp Capability	1 - Beginning	2 - Launching	3 - Advancing	4 - Mature
Exp. Vision, Leadership & Alignment	No intended employee experience targets exist. Lack of clarity around experience goals.	Bottom-up department specific visions for experience. Focus on experience initiatives, but primarily reactive – "firefighting" approach.	Executive sponsor vision, but not consistent buy-in from all. Proactive focus by individual departments.	Unifying vision for cross-enterprise experience management; majority buy-in. Consistent and integrated approach.
Understand the Experience	Unaware of experience from employee perspective or listening but not leveraging information.	Established Voice of Employee (VoE) process; using one or two channels in limited fashion. Closing the loop only with detractors.	Expanded VoE Channels, including structured and unstructured data. The employee voice is becoming a conversation. VoE efforts are becoming organized and cohesive.	Includes all channels and fully integrates relevant business and experience data into workflows. Feedback is engrained in the business culture and the org proactively responds to key insights.
Design Experience & Improve	"Gut feel" about what to improve. Design happens in pockets of the organization or infrequently.	Map of critical experiences. Design begins to become integrated into projects.	Working on improving the top 2 -3 opportunities that matter to employees. Employees are learning how to leverage design techniques and understand the power of cross functional team design.	Roadmap of improvements for top drivers of loyalty. Exp is integrated into E2E solutions. Design expands broadly (service, product, systems etc.) Innovation and customer co-creation differentiators.
Experience-Centric Culture	Culture developed organically. Lack of awareness or understanding of cultural impacts.	Aware of aspect in culture that may help or hinder. Culture is not yet aligned to experience goals, but programs are in place to address.	Culture viewed as an asset, and is managed with targets. Cultural traits that support business strategies have been identified. Ability exists to analyze trends in culture and address issues.	Desired elements of the culture are identified, ingrained and sustainable as "the way we work here." Ability to adapt to changing needs is important. Continually enhancing the employee and customer experience.
Governance & Process	No clear roles/responsibility exist for the customer experience; governance framework to care for the experience is not yet formed or exploratory.	High level, unwritten governance exists. Teams and experience-focused committees provide mostly updates.	Roles and responsibilities are developing. Teams have clear operating guidelines, expectations, and goals. Cross enterprise, multi-departmental governance exists.	Clearly defined roles and responsibilities. Executive support accountability. Cross-enterprise governance well established and adopted.
Measures, Metrics & Value	No defined Experience metrics for success, or metrics are defined, but not yet leveraged.	Defined targets published to select group. Some leading indicators included. Visibility of key attributes in the experience are measured sporadically.	KPI's become part of the normal scorecard reporting and grow in importance. Leading indicators are becoming more important. Measuring across the lifecycle. Operational and financial data tied to Exp measures.	Exp. KPI's are an integral part of the organization scorecard and business decisions are made around the results. Everyone understands the business impact of experience. Measures and metrics are integrated to support the experience journeys.

Be the catalyst

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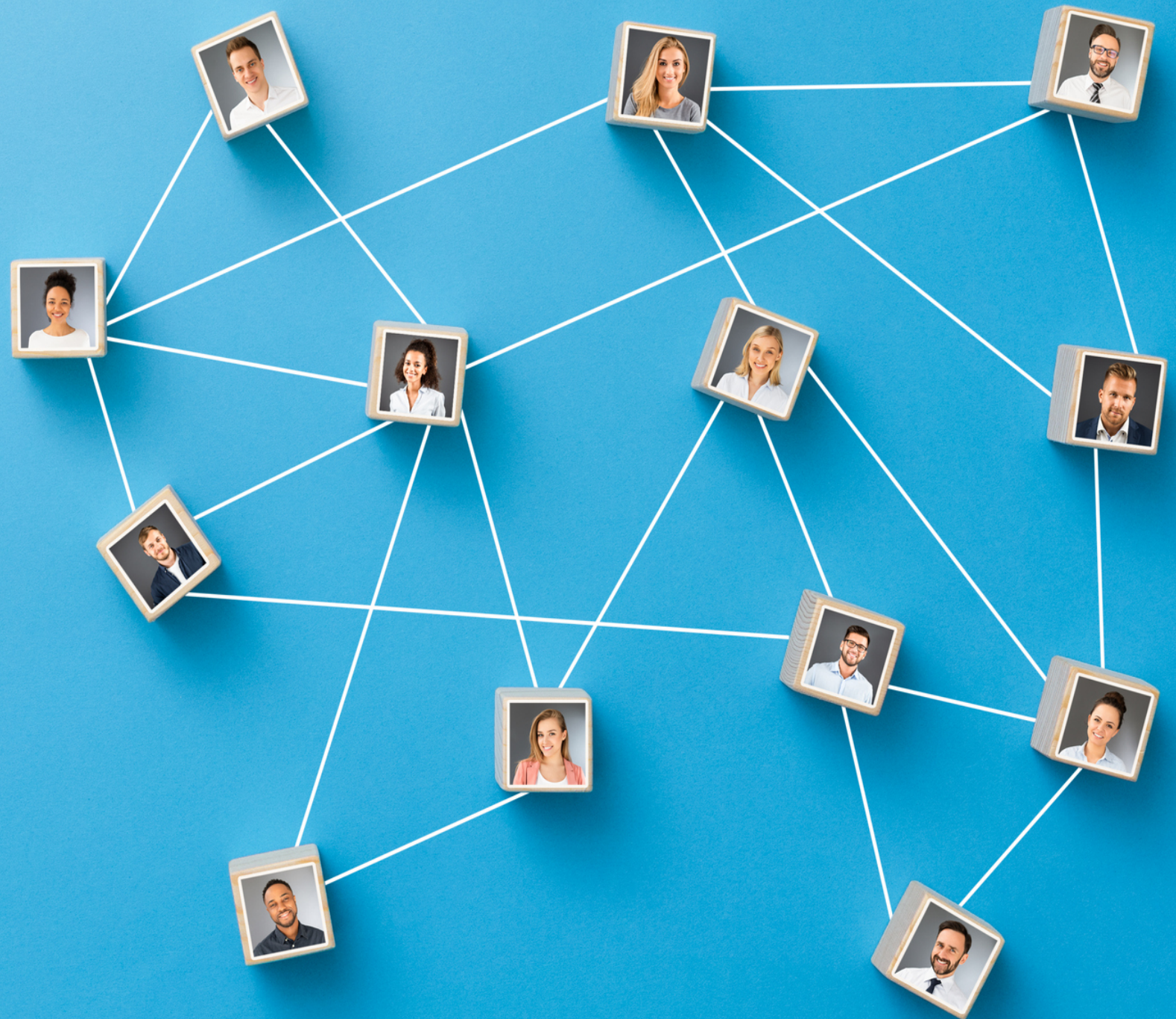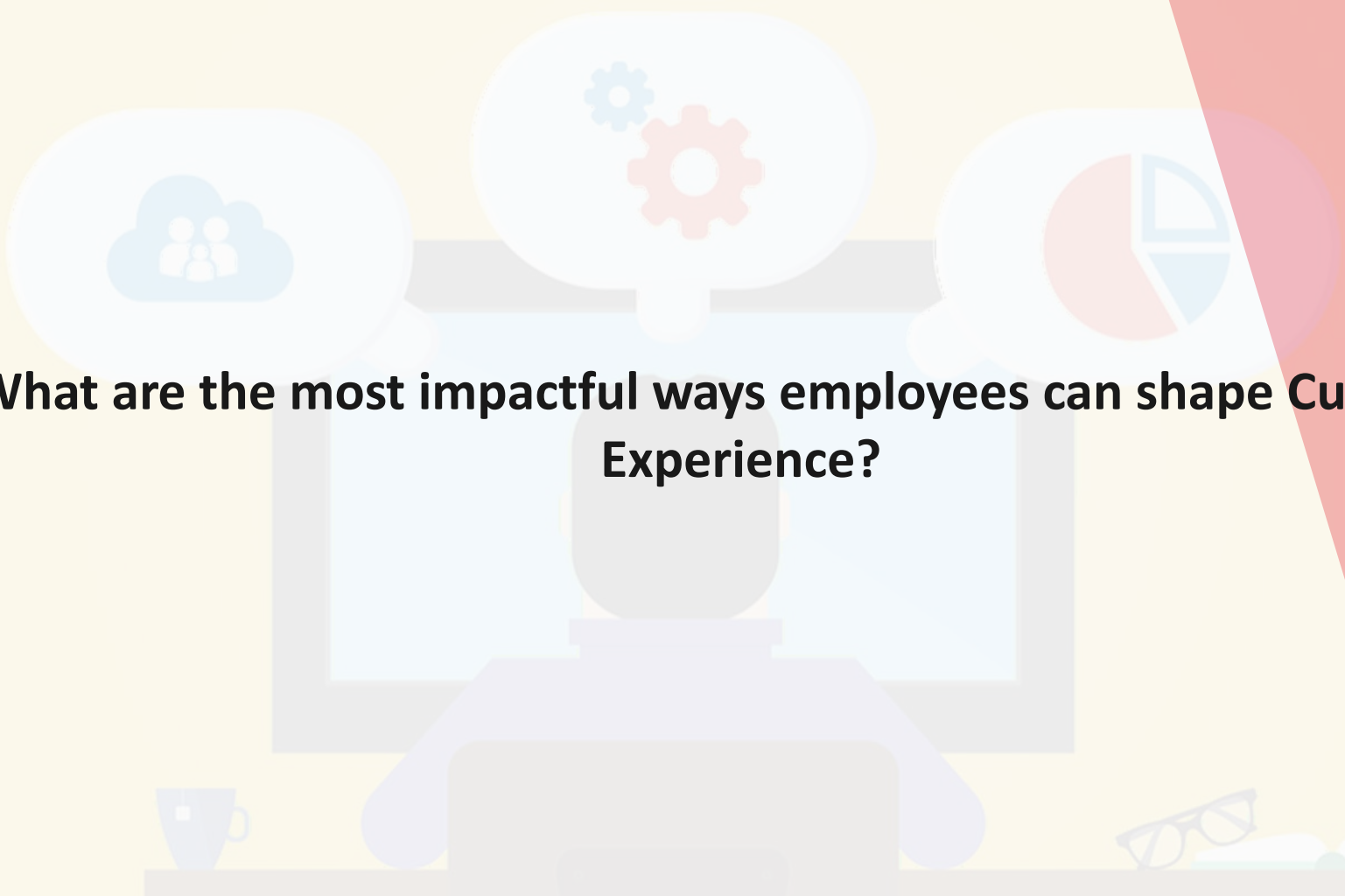
How can focusing on Employee Experience elevate the importance of Customer Experience in an organization?

Results. Guaranteed.

How are employee expectations changing?

Results. Guaranteed.

What kinds of Employee Experience improvements are leaders implementing?

Results. Guaranteed.

What are the most impactful ways employees can shape Customer Experience?

Results. Guaranteed.

Thank You!

Connecting Customer and Employee Experience

Ask an Expert?

Be sure to schedule your private
One-on-One & Team Sessions!

https://info.obsglobal.com/ex-ask-an-expert

disrupt idea co. | online business systems

Thank You!

COMPLIMENTARY LEADERSHIP ONLINE FORUM

for attending.

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