

PRESENTED BY: NATE BROWN

# CAPTURING THE LOYALTY OF THE MODERN CUSTOMER



# Nate Brown

Named a top global  
CX thought leader by

netomi


ICMI

Qminder


LITMUSWORLD

and more



About me. 

I am a student of the world's best  
Customer Experiences and the people  
that create them.

Experience Design 

Dancing Abilities 

Pickleball Skill 

## **CUSTOMER EXPERIENCE**

The thoughts and perceptions customers have towards a brand.

## **PSYCHOLOGY**

The scientific study of the mind and behavior.

THE OVERLAP IS CLEAR.



# LET'S ENTER THE MIND OF CX

**Voice of  
Customer**

**Employee  
Experience**



**Strategy**

**Metrics**

**Psychology**



01.

# CX STRATEGY



## **CX IS**

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- A MENTALITY
- A WAY OF CONDUCTING BUSINESS
- AN ONGOING REVOLUTION



## **CX IS NOT**

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- A PROGRAM OR INITIATIVE
- A TEAM
- EVERYTHING



A group of people are gathered around a table, looking at a laptop screen. One person's hand is pointing at the screen. The scene is dimly lit, with the laptop screen being the primary light source. The text is overlaid on this background.

**"CX strategy depends on two things:**

**Changing the mindset of the organization  
and collectively adapting to delivering the  
desired experience." - *Maven Insights***

# LEADING CHANGE





# Company Identity Matrix

Source - HBR

EXTERNAL	<b>VALUE PROPOSITION</b> What are our key offerings, and how do we want them to appeal to customers and other stakeholders?	<b>RELATIONSHIPS</b> What should be the nature of our relationships with key customers and other stakeholders?	<b>POSITION</b> What is our intended position in the market and in the hearts and minds of key customers and other stakeholders?
EXTERNAL/ INTERNAL	<b>EXPRESSION</b> What is distinctive about the way we communicate and express ourselves and makes it possible to recognize us at a distance?	<b>BRAND CORE</b> <b>What do we promise, and what are the core values that sum up what our brand stands for?</b>	<b>PERSONALITY</b> What combination of human characteristics or qualities forms our corporate character?
INTERNAL	<b>MISSION AND VISION</b> What engages us (mission)? What is our direction and inspiration (vision)?	<b>CULTURE</b> What are our attitudes, and how do we work and behave?	<b>COMPETENCES</b> What are we particularly good at, and what makes us better than the competition?



02.

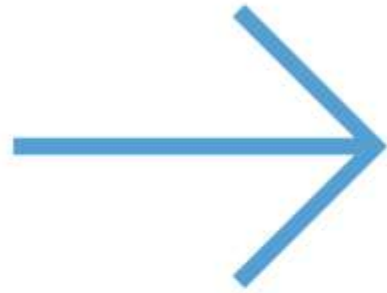
# VOICE OF CUSTOMER

We tell the customer's story...  
...with integrity.



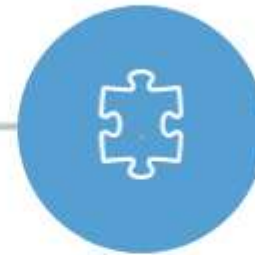


# PROCESS FLOW- VoC Engine



## Step 1

Review any and all VoC information available



## Step 2

Begin conducting 30-50 customer interviews



## Step 3

Design listening path maps with key touchpoints and VoC gaps



## Step 8

Brainstorm creative uses for VoC data



## Step 7

Help to centralize VoC data to analyze and tag



## Step 5

Complete initial journey map to lay baseline



## Step 4

Round out key personas alongside stakeholders

# CUSTOMER JOURNEY MAP: SAMPLE

**Key Objective:** To create the brand promise, protect it, and educate employees on how to best fulfill the brand promise everyday.

**Core KPI's:** Training Compliance, Lead Generation, NPS



**Name:** Rachel  
**Title:** Marketing Manager  
**Age:** 35  
**Degree:** Marketing MBA



**START**

**AWARENESS**

**SALES**

**IMPLEMENTATION**

**RAMP UP**

**ONGOING SUPPORT**

Description

The stage in which the customer is first introduced to the brand

Going through the stages of the sales cycle and outlining the partnership

Training, configuration, working toward first meaningful use

Working toward expansion and advanced usage

Finance, customer service, renewal, etc.

NPS= 14%

Needs and Expectations

Timely turnaround from sales associate

Knowledgeable PM

Established POC for escalations

Clear website

Ease of use

Live answer phone

Online demo

Proactive communication bi-weekly

Periodic recurring training

EOB= 23%

CES= 35%

CES= 47%

Pain Points

Inconsistent brand voice across departments

Bugs in software lead to wasted time and lost data

Negative WOM

Sporadic and unclear communication

General lack of recurring communication

Lack of product knowledge from sales

Overwhelmed at go live and first steps

Sales turnover

CES= 68%

RENEWAL=

75%

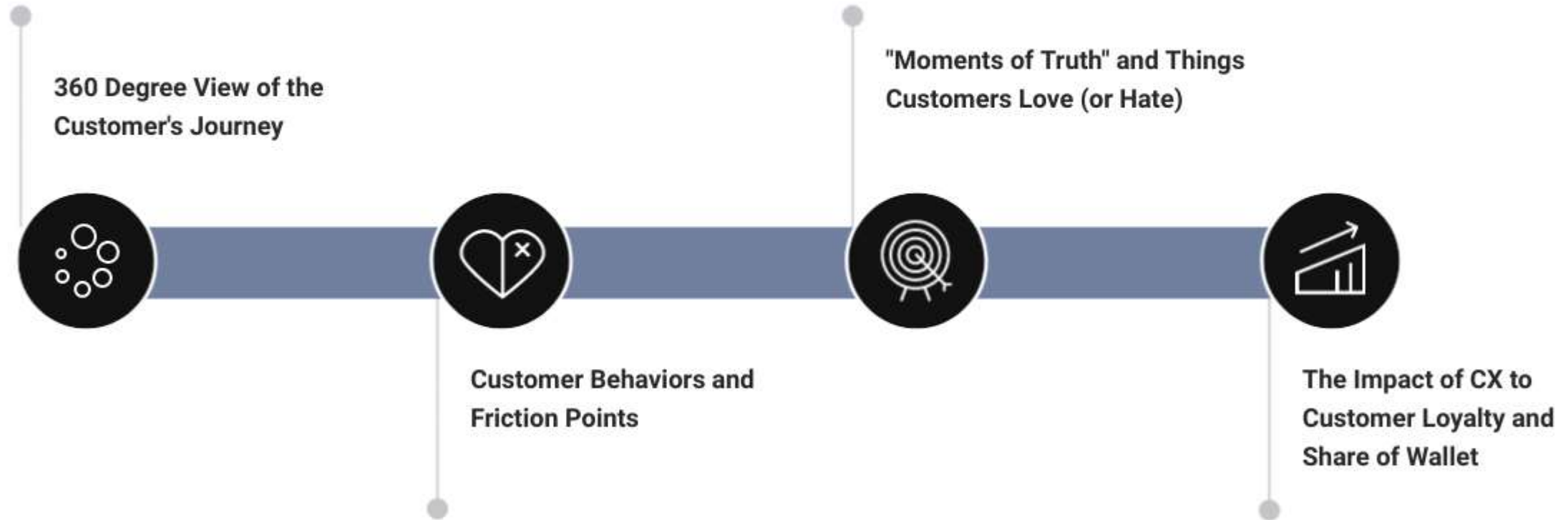


03.

# METRICS



# METRICS THAT MATTER



# VALUE-FOCUSED CX METRICS



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## Customer Lifetime Value

A simple version can be achieved by taking the annual profit per customer, multiplied by the average number of years a customer remains, and then subtract the cost of customer acquisition. Great way to show impact to share of wallet and renewals overtime.



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## Customer Health Score

This is a composite metric providing a value of health associated with specific customers based on a series of selected inputs. The power is by selecting inputs associated with various touch points, resulting in a simple number that spans the holistic nature of Customer Experience. *(CX Primer)*



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## Customer Growth Engine

On a quarter by quarter basis, measure how much you were able to increase your customer base by volume and value, followed by how many customers were lost by value and volume. Customers lost subtracted from customers gained is your Customer Growth Engine score for that quarter. Use whole numbers instead percentages. These straight-forward terms allow you to see how many customers are entering the journey, versus how many are choosing to leave. *(Jeanne Bliss and CCO 2.0)*

# CUSTOMER SENTIMENT

How customers feel about products, interactions, and more.

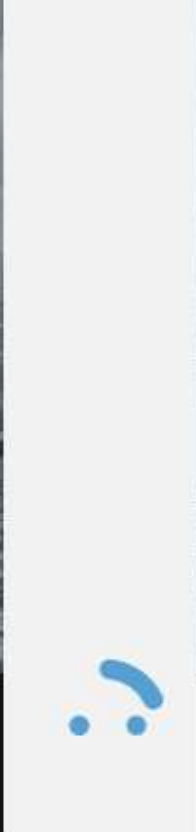


TEXT AND VOICE  
ANALYTICS

MOBILE DEVICE /  
VIDEO

THIRD PARTY  
LOCATIONS





04.

# EMPLOYEE EXPERIENCE

# WHY PEOPLE WORK



## PLAY

Curiosity and excitement  
about the work.



## PURPOSE

I'm doing something that  
matters.



## POTENTIAL

Am I becoming the person  
I want to become?

## WHAT HAVE WE DONE

464 custom applications

\* cloud security alliance report





# FRICITION

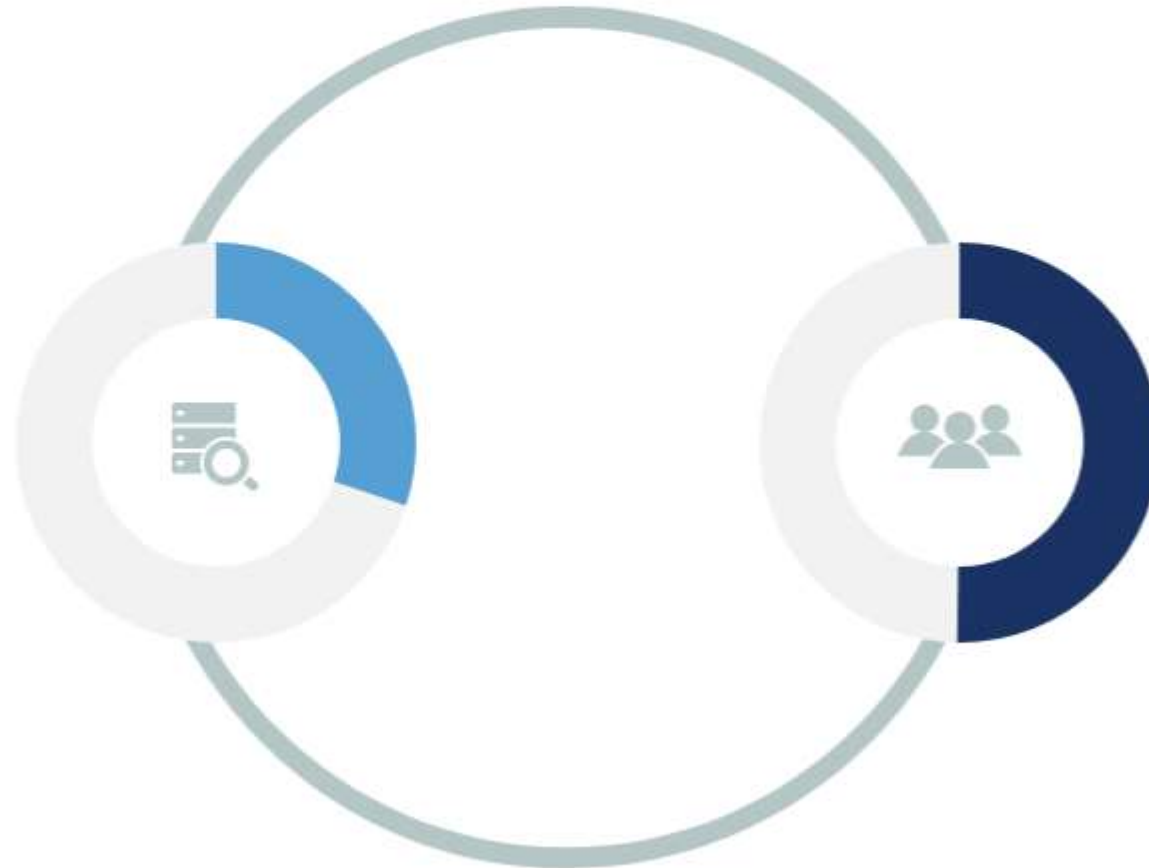
It's all around us.



**30%**

The average agent spends between 30 minutes and 2 hours EACH DAY looking for "trapped" information.

*-8X8 WFP Report*



**50%**

More than half of employees are unhappy at work because of the software they are using.

*- G2*



**#FreeToServe**



# COMMON CAUSES OF BURNOUT

*Inspired By Gallup*

## Lack of Trust

Psychological exhaustion associated with the feeling that you always have to protect yourself.



## Poor Communication

When there is a lack of transparency, we tend to assume the worst.



## Unrealistic Time Pressure

When it feels like there is never enough time to do quality work, burnout quickly follows.



## Unmanageable Workload

Hopeless feeling that comes with being overwhelmed. Can take different forms (time, type of tasks, difficulty).

## Lack of Support

When we feel alone and we can't share the burden, or expectations are unrealistic, stress is a natural result.



Leaders have one job only: to create a company culture in which employees cooperate naturally towards growing the business. - Simon Sinek





FIND THE FRICTION. BRING HARMONY.



**Tool  
Friction**



**Customer  
Friction**



**Heart  
Friction**



05.

# **PYSCHOLOGY OF CX**

“Customers are more savvy today. They see advertising rhetoric for what it is, and they no longer accept brands at face value. They are skeptical about the claims companies make. They want authenticity - brands that live up to their promises and stated ideals.”

- *Denise Yohn*





# THE LENS OF THE MODERN CUSTOMER



## LIFE

Supporting organizations that make the world a better place, according to our own definition.



## TIME

Supporting organizations that value our time and make it easy to do business with them.



## MONEY

Supporting organizations that consistently provide great value for their product or service.



**WE ARE THE GUIDE**



**Thank You!**

**Let's Connect.** 

**Text: 615.768.9099**

**[www.linkedin.com/in/cxaccelerator/](http://www.linkedin.com/in/cxaccelerator/)**