

# icmi™ TOOLKIT



The Road to Customer Experience Maturity:  
**A Self-Assessment**

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# INTRODUCTION

According to Gartner and Deloitte, by 2019, 89% of companies expect to compete mostly on the basis of customer experience; already, 62% of companies view the customer experience provided by the contact center as a competitive differentiator.

Most contact centers operate with the goal of delivering exceptional customer experiences, but how many achieve that objective? Executing on big-vision customer experience initiatives is daunting, and if no one “owns” the strategy, it’s nearly impossible to attain the desired results. While organizations often have the best intentions, disjointed policies and practices related to people, processes, and technology can result in high customer effort, frustration, lost revenue, and an overall lack of engagement.

In this toolkit, we’ll provide a framework you can use to deliver standout customer experiences. Find out everything you need to know about the modern customer experience and then assess your teams’ level of customer experience (CX) maturity so that you can find opportunities for refinement. The step by step resources in this toolkit will enable your organization to build incremental CX improvements by integrating your people, process, and technology more strategically.

Ready to get started? Join us on this journey to CX discovery and maturity!



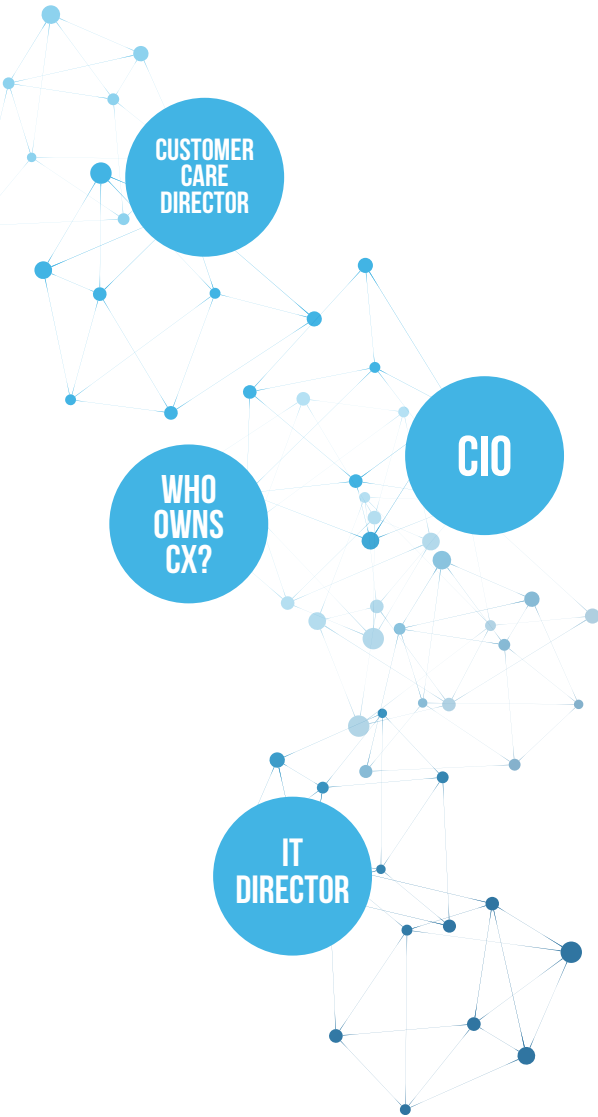
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# PART 1: ESTABLISHING A FRAMEWORK FOR CX MATURITY



The customer experience (CX) revolution has taken the business world by storm—from industry to industry, countless organizations have disrupted seemingly impenetrable markets through superior CX design. While this can be intimidating, there’s a significant opportunity to be claimed for those willing to take the leap and make the long-term investment in CX.

By way of definition, according to Forrester, customer experience is “how customers perceive their interactions with your company.” While related, CX is entirely different from customer service. Customer service is one very critical touchpoint that contributes to the broader customer experience; CX management brings the entire organization together under the banner of customer success. CX is both art and science: scientific, in the sense that CX is made up of repeatable steps and behaviors; artistic, in the sense that you’re dealing with human emotions and perceptions.

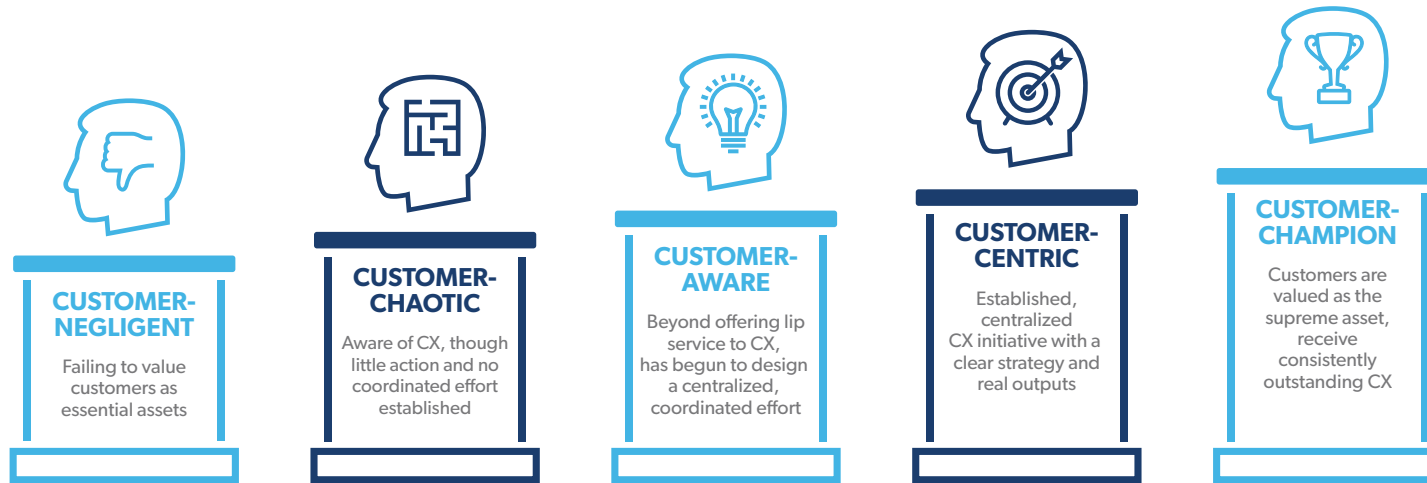
While there is no shortcut to effective customer experience design, there are proven principles to accelerate results. It’s not uncommon to find that three or more leaders are “responsible” for customer experience in an organization. This reality makes it very difficult to organize and move the organization toward a unified CX vision. The resources in this toolkit will act as a roadmap for aligning your people, process, and technologies for maximum customer benefit.

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Before we move to the assessment phase, let’s begin with a brief overview of our CX maturity model. We’ve identified five levels of maturity:

- **Customer-Negligent** – An organization that is failing to value customers as vital assets and doesn’t consider CX a priority.
- **Customer-Chaotic** – An organization that is becoming aware of the value of CX. While the organization has taken no significant actions or a coordinated effort associated with it, CX is at least acknowledged and talked about as something important.
- **Customer-Aware** – An organization that has paid more than just lip service to CX and has begun to design a centralized, coordinated effort.
- **Customer-Centric** – An organization that values its customers and considers them in every major business decision. These organizations have established, centralized CX initiatives with clear strategies and tangible outcomes.
- **Customer-Champion** – An organization that values customers as the principal asset. In these organizations, industry-leading design combined with near-perfect execution leads to superior CX.

# 5-STAGE CX MATURITY MODEL



Next, let's break down the people, process, and technologies associated with each of these stages. As we do this, you should start to visualize the gaps between each area and identify key requirements for advancing your CX program.

A word of encouragement (especially for those just getting started): The fact that you're consulting this resource and being intentional about developing CX management puts you far ahead of most. Try not to get overwhelmed by how far you have to go—it's a journey, after all, and investing in CX is simply the right thing to do.

A note of caution: The reason so few organizations excel at CX is that they fail to take the long-term view into consideration. In many cases, when stakeholders don't see rapid results, they cut programs. This often happens within the first year, before the program even has the chance to get off the ground. The mentality of those doing the work, as well as the executives supporting the efforts, is critical to your overall success. Ultimately, changes to CX are culture changes, and culture is just "the way we do things." The goal is to change the way people behave, the way processes are designed, and the way technology functions to better serve customers. Any change of this magnitude, especially in larger organizations, requires a significant investment of time and resources. Moving through these stages of CX maturity is a marathon, not a sprint, so be sure to set expectations appropriately.

With that out of the way, let's take a closer look at the five stages of CX maturity! As you're reading, try to picture where your company is presently. The CX maturity assessment that follows will help you take a snapshot of your current state; the gap analysis and descriptions in Part 3 will help you identify and capture the logical next steps for your organization.

## CUSTOMER-NEGLIGENT

While the "experience economy" (or, "the age of the customer") has undoubtedly pushed many beyond this stage, many organizations don't yet recognize customers as valuable assets. Internally focused cultures, quarterly revenue pressure from stakeholders, and distracted leadership teams are just a few of the common contributing factors. With that in mind, let's look at the attributes of people, process, and technologies for an organization in this stage.

- **People** – The employees of a "customer-negligent" organization aren't aware of the customer journey and the role they play in it. Employee engagement is low or nonexistent, and employees are demotivated by factors such as fear, social pressure, or short-term financial gain, none of which contribute to positive CX.
- **Process** – The organization is trapped in survival mode. "Process" in this scenario usually amounts to "whatever gets us through the day." Alternatively, the development

of processes may be too internally focused. Instead of considering how a process will impact customers, employees make decisions based on what's most convenient for them. No leader is responsible for any CX-related outcomes.

- **Technology** – At this stage, technology is a mixed bag. Each department may have its own basic, homegrown toolset with its own cache of knowledge and very little integration. Because information isn't flowing through the organization, resolving customer requests requires a high degree of effort. An organization at this stage is likely laboring under an unnecessarily high contact volume, and response times are suffering. The contact center supports, in all likelihood, a single channel of engagement, there is little to no reporting, and Voice of the Customer (VoC) data is either not being collected or is trapped in different systems across various touchpoints.
- **Key Metrics** – Cost per contact, call/contact volume

### CUSTOMER-CHAOTIC

Most of us, being customers ourselves, will at least acknowledge that CX matters. It's easy for company leaders to stand in front of the organization and proclaim how important customers are; the challenge is moving beyond lip service to develop meaningful actions and behaviors.

- **People** – Employees in this stage are confused. They hear their executives talk about the importance of serving customers, but the tune is different with their direct managers. They're held accountable for things that don't translate to positive CX. They may desire to act as an advocate for customers, but culture, process, and the lack of tools/technologies make it nearly impossible to do so. The result is often employee disengagement or frustration.
- **Process** – The organization has realized that it's been operating in the dark and resolves to get a better view of the CX landscape. The first step is establishing a VoC program, which is the foundation of a true CX initiative. While there's not yet a centralized leader who's responsible for CX, there may be a few different leaders who're accountable for CX-related outputs, such as renewal rates or customer satisfaction (CSAT) scores. Reporting is limited to basic information, like average handle time, volume of contacts, etc.
- **Technology** – The organization's toolset—PBX, basic CRM, homegrown agent scheduling tools, etc.—operate in isolation, restricting information exchange and hampering its ability to provide a consistently excellent experience. Specific functions (customer service, marketing, sales, or finance, for example) have tools that define and capture what CX looks like in their part of the world, but they're challenged when it comes to collaborating across these systems. There are few channels for customer

interaction, VoC data is necessarily limited, and employees expend considerable time and effort running manual imports from one tool to another and jury-rigging reports for senior leadership.

- **Key Metrics** – Average handle time, call/contact volume

### CUSTOMER-AWARE

The Customer-Aware organization has gone through an "awakening" period. The value of a customer focus has started to permeate through the ranks, and the excitement around CX is palpable. At this stage, it's likely that some employees are intrinsically motivated to help customers but may not have had the supporting processes, technologies, or culture to act in the past. Now, these employees are free to express themselves and dream up ways to positively impact CX. The challenge is harnessing this powerful energy and bringing it together in a coordinated effort for maximum impact and influence.

- **People** – The organization values feedback, both from customers and employees. There are strong VoC and Voice of the Employee (VoE) programs in place. While the ability to do the right thing for customers is sometimes limited by process and technology, there's no longer a question of IF helping the customer is the right thing. It's simply about how. Senior leadership is driving this culture shift, but it's taken hold at all levels of the organization. Employees have the tools they need to succeed, and they're aware of the customer and the role they play in the customer journey.
- **Process** – At this stage, the customer experience initiative plays a significant role in determining which priorities are the most critical for the business. Brand consistency across touchpoints enters the conversation. While processes may vary behind the scenes, customers perceive themselves to be working with one organization versus many different teams. There are many process change methodologies the company may be using, including Lean/Six Sigma, ITIL, value stream mapping, and Agile. While the CX leadership may not yet be driving the change process, they're at least considered a key stakeholder. Reporting reflects these shifts, as intermediate CX-related metrics are added to the mix.
- **Technology** – The toolset of the Customer-Aware organization enables critical data to flow across teams; the tools of the Customer-Chaotic organization are integrated with each other and with less siloed solutions. In general, employees have access to information without having to pull it from another tool manually or request it from another employee. At this stage, leadership is aware of the impact of both internal and external "effort." It's likely becoming evident that while culture, process, and multichannel interactions have all evolved, systems are holding the company back. Employees want to reduce effort and create a consistent experience for the customer across all channels, and they may even have identified specific ways to accomplish this objective, but they're limited in their ability to execute with the current toolset.

- **Key Metrics** – First call/contact resolution, CSAT, NPS

## CUSTOMER-CENTRIC

- **People** – When you enter a Customer-Centric organization, you can immediately sense the energy that comes from serving customers together. There’s a rigorous hiring process to ensure that new hires are compatible with the customer-focused culture. Leaders within this organization are selected for their customer and employee experience, and are committed to removing any barriers to outstanding customer and employee experiences. They’re held accountable for these objectives as the most important priority. Employees in this organization feel empowered and equipped with the tools to succeed; they’re also keenly aware of the “brand voice” and do their best to speak it.
- **Process** – At this stage, CX is the primary driver for process improvements that enable customer success. VoC feedback engine fuels organizational priorities. Senior management backs the execution of these changes and involves stakeholders from across the organization. CX-related metrics, such as NPS, CSAT, and CES, validate the success of process changes.
- **Technology** – In a Customer-Centric organization, systems speak to each other, enabling knowledge (and reporting) to flow across channels and the organization. Employees can see all the key data associated with a customer, across the various touchpoints, all in one place, offering the transparency required to assist quickly. Advanced solutions, like intelligent routing, adaptive workforce management, and customer and agent analytics enable predictive service. Employees feel empowered and equipped with the tools they need to do their job well.

- **Key Metrics** – CES, NPS, CSAT, churn rate, response time, resolution rates

## CUSTOMER-CHAMPION

- **People** – This organization sees the customer as the hero, and they position themselves as the guide to help their customers succeed. All employees are fully fluent in the brand voice, creating a powerful consistency across all channels. Individuals are intrinsically motivated to provide outstanding customer experiences and proactively identify CX improvement opportunities. Leaders are held accountable for the customer and employee experience. The company culture is contagious: employees are engaged, retention is high, productivity is high, and turnover is low. When customers win, everyone wins.
- **Process** – CX is a key strategic lever for success; it’s connected across the entire customer lifecycle and drives all business decisions and process changes. Effortless collaboration is second-nature in a Customer-Champion organization. All stakeholders are unified under one objective: to have the maximum positive impact on the customer experience. This level of alignment dramatically reduces the time it takes to implement changes and achieve buy-in from all layers of the organization. Innovation is born from a combination of customer feedback, employee feedback, and creative empowerment.
- **Technology** – The Customer-Champion has the technology required to drive everything referenced above. A harmonized toolset allows knowledge to flow through the organization seamlessly. An adaptive/open and unified platform, with all essential customer service apps, is connected both at the UI layer and the data layer. Employees can do their jobs with relative ease, which facilitates quick and intelligent resolutions for customers across all

teams, all channels, and in all geographic locations. Additionally, the Customer-Champion is leveraging predictive analytics, AI, machine learning, natural language processing, and similar technologies to pursue proactive resolutions. The organization leverages data to anticipate the needs of your customers takes effort-reduction to the next level.

- **Key Metrics** – CES, NPS, CSAT, churn rate, customer lifetime value, response time, resolution rates

Mastering CX is essential to shifting the perception of the contact center away from being a cost center toward being a revenue-generating. The assessment in Part 2 will help you take a snapshot of your progress toward CX mastery.



## PART 2: ASSESSING YOUR CURRENT STATE OF CX MATURITY

Now that we've established a baseline for defining CX and determined why it's a critical component of organizational success, let's discover how mature your contact center is currently. This assessment will help you evaluate and benchmark your overall maturity with regards to organizational, people, process, and technology functions.

To complete this exercise, read each statement and rate your progress toward achieving that goal on a scale from 1 (no progress) to 5 (achieved). After you've finished, move on to Part 3 to learn how to tally your overall score and analyze the results.



## ORGANIZATIONAL

<b>ORGANIZATIONAL ALIGNMENT</b>	Contact center staff understands how failures in service impact the organization. Contact center management understands and can articulate the functions, processes, and activities that are critical to the organization's success, adjusting services in response to changes in the organization and/or customer requirements.	
<b>GOALS AND OBJECTIVES</b>	Operational, tactical, and strategic goals that align with the customer service and overall organization are defined, documented, and communicated.	
<b>STAKEHOLDER ENGAGEMENT</b>	The contact center invites stakeholders to provide input on goals and participate in the development of action plans. The contact center regularly and proactively provides feedback to stakeholders on the results of actions taken as a result of their input.	
<b>RESOURCE ALLOCATION</b>	Resource requirements and allocations are based on established service level targets and organizational goals/objectives and are regularly reviewed to accommodate changes in organization and/or customer requirements.	

## PEOPLE

<b>CUSTOMER SATISFACTION</b>	A comprehensive customer satisfaction program is in place that includes multiple methods for assessing customer satisfaction and responding to feedback that doesn't meet minimum targets; the results are communicated to staff, stakeholders, and customers, and are used for continuous improvement of contact center services.	
<b>CUSTOMER SATISFACTION REPORTING</b>	Customer satisfaction data is collected and reported on a regular schedule and evaluated against established performance goals/targets.	
<b>EMPLOYEE SATISFACTION</b>	Employee satisfaction data is collected and reported on a regular schedule and evaluated against established performance goals/targets.	



## PROCESS

<b>OPERATIONAL PLANS</b>	The contact center's operational plan is documented, updated regularly as changes occur in the environment, and reviewed at least annually for continuous improvement and ongoing enhancement of the customer experience.	
<b>EVENT MANAGEMENT</b>	The contact center's roles and responsibilities related to event management (incidents, service requests, etc.) are documented and communicated to staff, and a contact center representative is actively involved in reviewing the event management process for continuous improvement.	
<b>FEEDBACK MANAGEMENT</b>	The feedback management process (including capturing feedback and actions taken in response to captured feedback) are documented, routinely followed, and reviewed for continuous improvement.	
<b>SERVICE LEVEL MANAGEMENT</b>	Service level targets, service level objectives/agreements, operating level objectives, and underpinning contracts are established between customers and key stakeholders, published, and reviewed at least quarterly to document and implement any actions needed to address missed targets/goals.	
<b>CONTINUOUS IMPROVEMENT</b>	Processes and procedures are identified, documented, and reviewed regularly, but management and stakeholders, to identify deficiencies and improvement opportunities; the contact center regularly makes improvements and communicates with stakeholders in a timely manner.	
<b>QUALITY ASSURANCE</b>	A quality assurance process is defined and consistently followed, with results communicated to contact center staff in a timely manner, along with appropriate recognition and/or coaching, and used as a performance indicator in the performance management process.	
<b>WORKFORCE MANAGEMENT</b>	The workforce management process is based on one or more formal methods/models for meeting service level targets; it's documented, consistently followed, and reviewed at least annually for continuous improvement.	

## METRICS

<b>SERVICE LEVEL/ RESPONSE TIME</b>	Performance data is routinely collected, and service levels/response times are tracked and consistently achieved (within 5% of the objective) at the interval level for 70% of the intervals over the past 6 months.	
<b>CONTACT METRICS: CONTACT VOLUME, AVERAGE HANDLE TIME, FIRST CONTACT RESOLUTION</b>	Performance data is collected and reported on a regular schedule, and reports show the established performance goal/target has been achieved or exceeded in at least 9 of the past 12 months (or equivalent reporting period).	

## TECHNOLOGY

<b>ROUTING TOOL/ SYSTEM</b>	The routing system is integrated with other systems, like workforce management, and provides automated routing capabilities, real-time stats for contact center management and staff, and alerts in advance of missing a service level target.	
<b>WORKFORCE MANAGEMENT TOOL/SYSTEM</b>	The workforce management tool/system is integrated with other systems, using volume of work, work time, and service level targets to determine optimum staffing schedules, as well as providing real-time stats on schedule adherence and performance.	
<b>OMNICHANNEL TOOL/SYSTEM</b>	The contact center supports multiple channels seamlessly and uses an omnichannel tool/system that integrates multiple functions (i.e., routing, analytics) to optimize performance and service quality.	
<b>REPORTING TOOL/ SYSTEM</b>	A reporting tool/system is integrated with other contact center systems, providing real-time reporting on service levels and performance against targets, as well as highlighting opportunities for performance and quality improvement.	

# PART 3: CALCULATING AND ELEVATING YOUR CX MATURITY

***If you haven't completed the maturity assessment, go back to Part 2.***

On the following page, tally up your total and identify your current state based on the score ranges in the table. Capture your individual activity scores as well as your total on the gap analysis worksheet that follows, and then use it to prioritize your gaps, brainstorm actions to close the gaps, and set goals for completion.

ACTIVITY	Current Rating	Gap from Future State (5 – current rating)	Priority of Gap	Potential Effort (Low, Medium, High)	Type of Initiative (Strategic, Operational, Optimization)	Action(s) to Address Gap	Target Completion Date
Organizational Alignment							
Goals and Objectives							
Stakeholder Engagement							
Resource Allocation							
Customer Satisfaction							
CSAT Reporting							
Employee Satisfaction							
Operational Plans							
Event Management							
Feedback Management							
Service Level Management							
Continuous Improvement							
Quality Assurance							
Workforce Management							
Service Level/Response Time							
Contact Metrics							
Routing Tool/System							
Workforce Mgmt Tool/System							
Omnichannel Mgmt Tool/System							
Reporting Tool/System							
<b>TOTAL</b>							

THE 5 STAGES OF CX MATURITY				
0-20 points	21-40 points	41-60 points	61-80 points	81-100 points
Customer-Negligent	Customer-Chaotic	Customer-Aware	Customer-Centric	Customer-Champion

# CLOSING THE GAPS

## **Getting from Customer-Negligent to Customer-Chaotic**

Breaking out of the Customer-Negligent stage requires at least one “Gandalf” who can turn the tide. This individual will need to have a strong voice and be in a position of influence. It’s not enough to create a customer-centric pocket in just one area of the business. A major factor in brand loyalty is brand consistency. Until someone can generate a buzz about the importance of a unified CX approach, empowered by the proper technology, resources, and processes, customer negligence will persist. If there isn’t a person within the organization who can become this catalyst, outside resources may be necessary.

## **Getting from Customer-Chaotic to Customer-Aware**

The keyword here is *action*. Customer-Aware organizations have a strategy to coordinate the CX effort, one that requires clear leadership and a unified vision. This stage is all about making the larger organization aware of the unified CX vision and the role they play in fulfilling it. Here are a few recommended actions to advance to this stage:

- Establish a clear CX function with centralized leadership
- Give employees a voice and encourage them to serve as customer advocates
- Use a VoC program and journey mapping to make employees aware of the current state of CX
- Customer feedback is valued and captured using structured and unstructured feedback channels

- Technology exists to capture structured and unstructured feedback from customer interactions.
- At a minimum, enable limited integration of critical systems across the organization to allow for the flow of essential information
- Track Net Promoter Score (NPS), CSAT, and customer effort score (CES) across the various customer touchpoints

## **Getting from Customer-Aware to Customer-Centric**

With feedback pouring into the Customer-Aware organization, they can make better, smarter decisions that will have a meaningful impact on CX. The Customer-Centric organization has the framework required to execute. Here are a few recommended actions to advance to this stage:

- Develop a “brand voice” and make this known across the organization
- Drive process improvement based on both customer and employee feedback
- Use CX-specific process improvement techniques, such as journey mapping and cause-and-effect diagrams, to set priorities
- Enable integrated systems and technology that allow a seamless flow of information across the organization, and empower both agents and customers with robust knowledge.
- In addition to NPS, CSAT, and CES, begin to track other CX metrics, such as churn rate, customer lifetime value, and employee experience

## **Getting from Customer-Centric to Customer-Champion**

Achieving the pinnacle of CX maturity is entirely possible with patience to build the right culture and the right set of tools. Organizations who reach this level of customer success will typically outperform their competitors by a significant margin. Additionally, they will have secured the one competitive advantage that cannot be quickly replicated by another company. Here are a few recommended actions to advance to this stage:

- Establish a chief customer officer or similar role in the C-suite
- Vet new employees for organizational fit and immediately onboard them into the CX program
- Aggressively pursue feedback from employees and customers to improve and innovate
- Encourage collaboration through intelligent design of office space, virtual community, unified vision, and positive atmosphere
- Enable effortless resolutions and knowledge flow by using a harmonized toolset
- Consider additional CX-related metrics, including first response rate, resolution times, customer satisfaction by channel, and many more
- Leverage AI, predictive analytics, machine learning, and similar technologies to enable proactive resolutions

# ABOUT US

## ICMI™

ICMI is the leading global provider of comprehensive resources for customer management professionals—from frontline agents to executives—who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations, and improve your customer service.

ICMI is organized by UBM, which in June 2018 combined with Informa PLC to become a leading B2B services group and the largest B2B events organizer in the world.

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NICE inContact is the cloud contact center software leader, empowering organizations to provide exceptional customer experiences with the world's #1 cloud customer experience platform, NICE inContact CXone™. CXone combines best-in-class omnichannel routing, workforce optimization, analytics, automation and artificial intelligence on an open cloud foundation to help companies act smarter and respond faster to consumer expectations. NICE inContact, a NICE company, is recognized as a market leader by Gartner, IDC, Frost & Sullivan, Ovum and DMG, and serves customers in more than 150 countries, including over 85 of the Fortune 100 companies.

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