Forsta

The business value of CX

How to design a program that delivers

Contents

Introduction

In a world of growing expenditure and tightening budgets, **it's crucial to armor your CX initiatives against cost-cutting exercises by making their value clear and tangible to the wider business.**

What is customer experience?

When was the last time you were thrilled – or frankly annoyed – as a customer?

Customer experience (CX) is the overall perception that customers have towards a brand based on the cumulative effect of all the interactions (positive or negative) they've had with this brand.

Like, an enchanting visit to a store, a call to the hotline that took too long to answer, a web experience that didn't lead to a purchase, an ad on TV that missed the mark...

The best customer experience programs take the customer relationship pulse at all touchpoints and channels across the customer journey, from first impressions to evaluation to purchase to support, and back again.

It's about understanding your customer's entire human experience when it comes to your brand, products and service.

Best-in-class customer experience programs encapsulate all these experiences, measure their impact on customer satisfaction, and understand how they affect customer behaviors and the entire business – that is, commercial outcomes.

A great customer experience (CX) program can completely transform your business – from increasing revenue growth, to strengthening customer retention.

Of course, stakeholders don't always fully realize the value that a well-planned, well-considered, well-executed CX strategy can bring; particularly when the pressure is on to reduce costs and curb unnecessary spending. And when CX is a cultural strategy, rather than just a functional program, magic happens.

So guess what – you're up.

It's on you to show that CX is essential to your organization's success.

Every modern business is fighting for their place in an overcrowded market. A market where the customer is king and truly reigns supreme. And where knowing your customer at every level - understanding their human experience - is crucial for survival, and success.

Some of the business benefits include:

Higher revenue

Bigger profits

Reduced costs

Stronger customer retention

Increased customer acquisition

The **what**

Delivering an impactful CX experience requires two starting points:

1. **Understand** how the current experience produces the current response.
2. **Decide** how to modify the experiences to produce the desired response.

The **how**

Then you can take these four steps:

1. **Gather** data based on the metrics which matter the most to your particular customer base and business.
2. **Analyze** your data by bringing it all together so you can see the stories behind the statistics
3. **Visualize** your insights to tell a compelling story that engages and energizes your organization.
4. **Act** on these insights and track your KPIs over time so that you can see trends, improvements and impact of CX investments on outcomes.

The **why**

And you'll get these three results:

1. More **growth**.
2. More **retention**.
3. More **revenue**.

We explain the incredible business value that a best-in-class CX program has to offer and talk you through how to design a program that really delivers – allowing you to see measurable results that will satisfy even the most stringent of stakeholders.

CX is a complete business strategy.

But only if you ensure that your work is strategic and transformational.

Many CX practitioners run up against some core issues.

You might find that your CX program is causing these common headaches, for you, and your business:

- It's not delivering value

- There's no ROI

- Nothing ever changes

- There are no learnings

- People don't engage with it

- No one takes any action

Tragically, this means that CX programs are often the unwitting victims of callous cost-cutting exercises; never having realized their full potential. Either that, or they're subject to unruly demand for proof of their effectiveness; proof that you might currently struggle to give.

Demonstrating the business value of CX.

To help you on your path to achieving complete, organization-wide CX buy-in, we've split this eBook into three key sections:

1. The what

We'll walk you through some common commercial outcomes to create an effective blueprint for your CX program.

2. The how

We'll show you how to choose the right CX metrics that link to those all-important commercial outcomes.

3. The why

We'll equip you with the know-how to turn insights into effective implementation and share tactics for real transformation.

By the end, you'll understand how to strengthen your CX program and deliver demonstrable value to your stakeholders.

1.
The what

Building your CX program
for commercial impact

Let's define commercial impact and unpick what we mean by commercial objectives.

Defining commercial impact

There are **two categories of commercial impact**: Above the line, and Below the line. It's crucial to understand how individual CX initiatives link to specific objectives in each.

	Common commercial objectives	CX initiatives
Above the line	Increase revenue growth	– Improve customer engagement – Explore cross-sell/up-sell opportunities – Increase purchase conversion, increasing traffic (in store or online)
Below the line	Strengthen customer retention	– Improve customer service, personalize experiences, and drive customer loyalty – Prioritize efforts towards customers at risk of churn – Identify client problems and needs
	Widen profit margin	– Iron out pain points with cost-effective CX delivery – Reduce customer acquisition costs
	Reduce costs	– Understand and predict customer behavior to improve efficiency and product delivery – Fix broken processes to improve efficiencies

The starting point for a commercially valuable CX program is finding a clear line of sight from each commercial objective to your own activities.

Justifying your CX program

Imagine you're in the boardroom (or Zoom room) and presenting to your executive team. While your CFO might want to talk about churn prevention, or customer retention as obvious CX initiatives that impact revenue directly, there are plenty of other initiatives that show how valuable your CX program really is. For example:

– Homing in on wasted effort and stopping activities that don't impact the customer will **lower costs**.

– Understanding what drives customer business and satisfaction will increase how much a **customer spends with you** versus your competitors.

– Forming deep, trusted relationships will reveal new opportunities for **cross-selling and up-selling**.

– Building loyalty and recognition across your customer base will make **customer acquisition easier**.

All these things have a sizeable – and demonstrable – business impact. And we're going to show you how to do exactly that.

Understanding what to ask, and why

First, you need to ask questions that illuminate business objectives aimed at the two types of commercial impact.

Key takeaways

- **Define types of commercial impact:** It's crucial to understand what matters to your organization, so that your CX efforts are directly appropriately.

- **Understand your questions:** Make sure you're asking the right questions, so that you get the answers you need to drive your CX initiatives.

- **Stay focused:** Don't focus on only one type of objective. Both revenue protection and growth are key to delivering a CX program that makes a difference.

These questions should focus on **growth** and **revenue protection**:

Growth

- What drives acquisition?

- What drives market share and share of wallet/spend?

- What opportunities are there to cross-sell or up-sell?

Revenue protection

- How do you increase customer loyalty?

- What drives retention?

- Which processes need refinement?

- How can we become more efficient?

Staying focused on what matters

But knowing what questions to ask (and answer!) is only the starting point: to really get your CX program off the ground and fighting fit, you need to bring your business goals into sharp focus – and build from there.

2.

The how

Tying your CX strategy
to commercial outcomes

An effective CX program hinges on choosing the right outcome metrics (and taking the required actions) that are aligned with your business goals.

To make the link between your CX strategy and the commercial outcomes your leadership team crave, you need to measure what matters when it comes to delivering change. This will vary, depending on your organization's goals and culture.

From experience, our dedicated CX consultants find CSAT, CES, and NPS to be the most useful metrics when designing and demonstrating the value of a CX program.

Deciding on the most relevant and informative outcome metrics for your organization is one of the most important aspects of any program design.

Without this crucial component, there is no clear direction, or action – and ultimately, no accountability (but more on that later). That's because without the right metrics, how can you know which actions to take, and who's responsible?

Check out these benefits.

Common commercial objectives

– Increase revenue growth

– Widen profit margin

– Reduce costs

CX initiatives

– Increase customer loyalty and repeat business

– Cost-effective CX programs, consolidate and perform better analysis

– Predict customer behavior to improve efficiency and product development

Benefits for the business

– Greater efficiency and consistency

– Lower cost, higher growth means more revenue growth and more to spend elsewhere

Benefits for the customer

– Increased personalization and engagement "They really know me"

How commercial objectives link to CX metrics

Here's a useful map of how specific commercial objectives feed into common (and not so common) CX initiatives and actions, and the best metrics to demonstrate their value.

Common commercial objectives	CX initiatives	Common CX metrics	Less common (but might suit your organization's goals and culture)	Example actions
Increase revenue growth	— Improve customer engagement — Explore cross-sell/up-sell opportunities	— **CLV (Customer Lifetime Value):** A customer's lifetime value to a company. By personalizing experiences and promoting repeat business, increasing CLV can lead to more revenue growth. — **CSAT (Customer Satisfaction):** Satisfied customers are more likely to return and refer others, driving revenue growth. — **NPS (Net Promoter Score):** Customers who endorse a brand to others can attract new business and revenue growth. — **Repeat purchase rate:** The percentage of customers who make multiple purchases, indicating a positive customer experience, and driving revenue growth. — **Average order value:** Increasing the average value of each purchase through upselling and cross-selling can lead to more revenue growth.	**Customer advocacy:** Measuring the percentage of customers who actively promote a brand or product can provide insight into the strength of the customer experience and the potential for word-of-mouth marketing.	— Organize a customer's previous purchases in the app with a quick click to add to basket. — Offer recipe recommendations using ingredients you know the customer buys frequently. — Offer personalized rewards and perks for loyal customers.

Common commercial objectives	CX initiatives	Common CX metrics	Less common (but might suit your organization's goals and culture)	Example actions
Widen profit margin	— Cost-effective CX delivery – iron out the pain points — Reduce customer acquisition cost	— **CSAT (Customer Satisfaction):** Satisfied customers are more likely to return and refer others, driving revenue growth. — **NPS (Net Promoter Score):** Customers who endorse a brand to others can attract new business and revenue growth. — **CES (Customer Effort Score):** Making things easy for customers to complete transactions can improve efficiency and lower costs, leading to better profit margins.	— **Customer Acquisition Cost (CAC):** CAC is a metric that calculates the total cost of acquiring a new customer, including marketing, sales, and other related expenses. Improving the customer experience to increase customer satisfaction can increase their referral and repeat purchase rate, lowering the CAC. — **Cost To Serve (CTS):** This measures the profitability of serving a particular customer, based on business activities and overhead costs. Decreasing this will increase the profit margin and help to improve efficiency across multiple areas of the business.	— Focus on top locations your customers are from to redeploy resources from locations with lesser yields — Make sure you're closing the loop with customers on any issue or complaint. — Encourage loyal customers to promote your brand with incentives such as referral discounts or freebies.

Common commercial objectives	CX initiatives	Common CX metrics	Less common (but might suit your organization's goals and culture)	Example actions
Reduce costs	— Understand and predict customer behavior to improve efficiency and product delivery — Fix broken processes to improve efficiencies	— **FCR (First Contact Resolution):** Fixing customer issues in one shot can reduce the need for follow-up interactions, improving efficiency and lowering costs. — **CES (Customer Effort Score):** Making things easy for customers to complete transactions can improve efficiency and lower costs, leading to better profit margins. — **Contact Center Abandonment Rate (CCAR):** No one likes to be put on hold or transferred from one agent to another. Improving the customer experience to reduce the number of customers who give up on seeking help can save businesses money on customer service and support costs.	— **Repeat complaint rate:** The percentage of customers who have experienced the same problem multiple times. Reducing the repeat complaint rate can improve customer satisfaction, reduce costs associated with resolving the same issues, and improve customer retention. — **Time to resolution:** The amount of time it takes to resolve customer issues. Reducing the time to resolution can improve customer satisfaction, reduce operational costs, and improve efficiency.	— Train agents to solve a wider range of queries at first contact. — Identify root cause of issues and move to fix or offer self-service resolutions. — Offer callback option to callers waiting to speak with an agent. — Announce estimated wait time/place in queue and update regularly. — Use interactive voice response systems to identify and collect query information upfront.

Common commercial objectives	CX initiatives	Common CX metrics	Less common (but might suit your organization's goals and culture)	Example actions
Strengthen customer retention	– Improve customer service, personalize experiences, drive customer loyalty – Prioritize efforts towards customers at risk of churn – Identify exact client problems and needs	– **Customer retention rate:** The percentage of customers who continue to do business with a company over time. Improving customer retention through personalized experiences and loyalty programs can lead to increased revenue and reduced costs associated with customer acquisition. – **CSAT (Customer Satisfaction):** Satisfied customers are more likely to return and refer others, driving revenue growth. – **NPS (Net Promoter Score):** Customers who endorse a brand to others can attract new business – leading to revenue growth.	– **Customer effort per channel:** Measuring the effort required by customers to complete transactions or resolve issues across different channels (such as phone, email, chat, or self-service) can help to identify areas for improvement and optimize the customer experience.	– Use geo-location data to deliver targeted offers.

Common commercial objectives	CX initiatives	Common CX metrics	Less common (but might suit your organization's goals and culture)	Example actions
Increase customer acquisition	Deliver engaging customer experience journeys	— **Conversion rate:** The percentage of customers who take a desired action, such as making a purchase or signing up for a service. A positive customer experience can improve conversion rates and lead to increased customer acquisition. — **NPS (Net Promoter Score):** Customers who promote a brand to their networks can help to generate new business and improve customer acquisition. — **Average order value:** Increasing the average value of each purchase through upselling and cross-selling can lead to increased revenue growth and customer acquisition. — **CSAT (Customer Satisfaction):** Satisfied customers are more likely to refer new customers, thereby improving customer acquisition.	— **Social media sentiment:** Positive sentiment seen online can attract new customers.	— Shorten your website forms. — Enhance your purchase process to make it simpler. — Add a live chat to answer website visitor queries in real time. — Offer a moneyback guarantee to reduce friction. — Create abandoned cart email campaigns.

For each of the initiatives (and the relevant metrics) you develop, it's important to build out the supporting tactics.

Supporting tactics

For each of the initiatives (and the relevant metrics) you develop, it's important to build out the supporting tactics.

As we've seen, all commercial objectives are supported by the initiatives that underpin them and the metrics used to evaluate performance. These, in turn, contain sets of tactical activities that ensure the business objective is met. And each tactic will need an owner – that's crucial. For example:

Commercial objective:

Increase revenue growth

CX initiative:

Explore cross-sell/up-sell opportunities

CX metric:

Measure customer lifetime value (CLV)

CX tactic:

Organize previous purchases in your app with a quick click to add to basket

Once you've decided on your metrics by establishing a link to your commercial objectives, find where you can make the most noticeable change.

Implementing an effective framework

Prioritization is crucial here so use this question framework to make your analysis most effective:

— **The customer.** Who is your customer? Does their behavior lend itself to a particular metric that you can easily track? For example, are your customers active on social media? Or perhaps your customers frequently contact your call center; in which case, focusing on customer effort score or average handling time should be your priority. Knowing your customer well is what matters here, so spend time getting this right. Your efforts need to be oriented towards the metrics that matter to commercial outcomes, but also to the customers that are most valuable to your business.

— **The interactions.** Where and when are your customer interactions taking place? What moments in the customer journey have the potential for improvement? For example, if your customers spend much of their time on social media, but your social interactions leave something to be desired, a focus on engaging with customers through the platforms they naturally gravitate towards could return the biggest rewards.

— **The interventions.** What interventions are going to move the needle, and at what cost? Remember the law of diminishing returns – at some point improving isn't worth the effort.
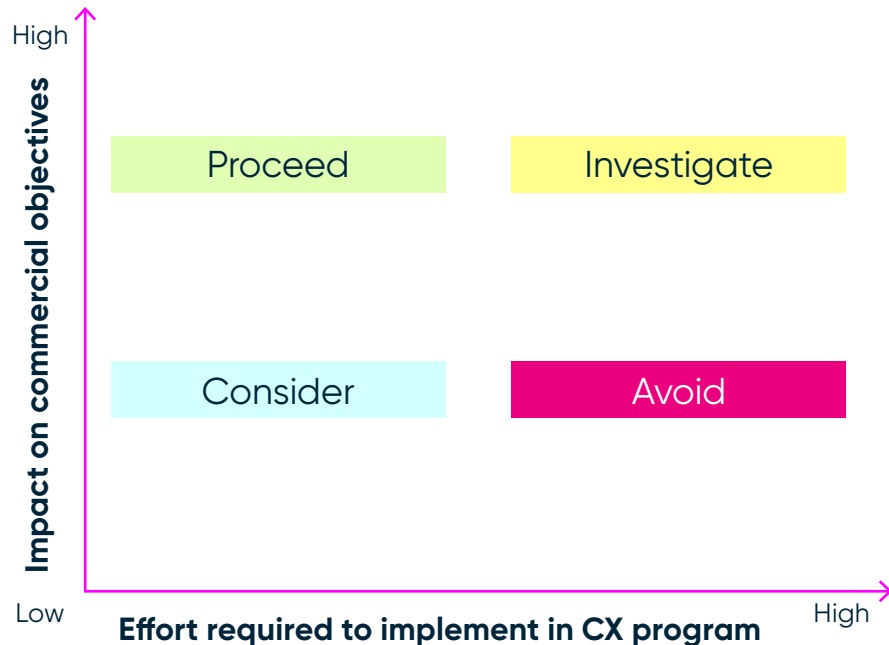
Use the action priority matrix to help prioritize. For example, your organization wants to increase revenue growth.

The CX initiative is to explore cross sell opportunities, which you measure using customer lifetime value to assess whether the tactic of providing a quick "add to buy" button delivers additional customer spend.

Make sure you're asking these **three important questions**, and assessing each intervention:

1. **What** is the desired commercial outcome?

2. **Who** is responsible for this commercial outcome?

3. **What** do you need to deliver this commercial outcome?

High

Impact on commercial objectives

Proceed

Investigate

Consider

Avoid

Low

Effort required to implement in CX program

High

Answers to these questions will help you identify the interventions that are more likely to achieve the commercial outcomes you've already mapped. For each initiative there might be a different way to think about prioritization. For example, a commercial objective to reduce costs links to the Customer Effort Score (CES) metric. By empowering your frontline with the authority to resolve issues immediately rather than transfer a customer to another department, you can improve your CES score, which translates into better efficiency and lower costs. And without too much effort to implement.

A focus on execution and delivery is a crucial part of the method. There is some truth in the adage that "what gets measured gets done", but only if someone is paying attention and takes the relevant action. And that someone should only take action if there's a clear, positive impact on the commercial objective that's being targeted.

Making sure that actions, whether they are already in play or new, move the needle is the key part of an effective, worthy CX program. This is why mapping your program to commercial outcomes or corporate objectives is so important. You'll only see change in the focus areas of the business; everything else will get pushed to the bottom of the priority list as a "nice-to-have", so set your focus clearly. It's also important to look back and see what actions have already been taken, and what can be learnt by doing a root cause analysis there – in the inner loop.

Now it's time to think about potential roadblocks. What could stand in the way of change where and when it's needed? These obstacles may be obvious, or a little more obscure. You may be up against organizational data silos, outdated CX analytics tools, or a business culture that's far from customer-centric; you might be blocked by stakeholders who are reluctant to invest in CX, stalled by a struggle to identify customer pain points, or stuck on how best to personalize experiences for your target customers.

Take each one in turn and ask yourself (along with your dedicated team) how can you overcome these? Who do you need to involve? What needs to happen for those obstacles to turn into golden opportunities?

> **"We are all faced with a series of great opportunities brilliantly disguised as impossible situations."**
>
> **Charles R. Swindoll**

Before we move onto Chapter Three (**The why** – it's a goodie!), let's quickly recap with a reminder that any successful CX program needs three key pieces of the puzzle:

1. Ownership

2. Outcomes

3. Obstacles

With those in place, you can build out a seamless execution.

Next up, we'll show you how.

Key takeaways

— **Define ownership:** Who is going to take the action? For example, who's addressing the insights from customer feedback and making the improvements necessary?

— **Identify outcomes:** Make sure your outcomes are closely linked to the objectives – so that you can show how you are moving the needle for the business

— **Pinpoint obstacles:** Knowing what's hindering progress is the first step to achieving – so give yourself the best chance for success from the beginning.

3.

The why

Transformation tactics
for commercial outcomes

At Forsta, we use a simple framework to plan out execution that delivers lasting change through organizational engagement.

Designing for change

The first step is to define your 'North Star' – which is your reason for doing this. In the retail example on the next page, the guiding goal is to increase online cart conversion by 1% – but your North Star could be anything from growing your share of the market, to increasing Customer Lifetime Value (CLV). It'll be up to you to set your success metrics, but be clear on these from the outset.

Next, you need to define both your customer and your business needs and agree ownership and responsibilities. If your goal is to increase online cart conversion, your customer needs might be centred around an improved digital CX, more competitive pricing, or better support at the check-out stage. Once you've identified those needs, who is going to manage their resolution? Will it be your CIO, digital marketing manager, a sales director, or someone else entirely? Depending on what that need is, who is best placed to facilitate real change?

Once you've decided on your strategic initiatives, defined your customer and business needs, and agreed ownership and responsibilities, it's time to implement effective change management tactics.

In this retail example, you can see that the eCommerce leader needs to find out what the digital experience is like, so he or she can identify which micro moments to improve.

Improving the digital experience might look like offering a discount code to web visitor who abandoned their online shopping basket before checking out – a clear CX tactic and one that can be owned by the team.

Strategic initiatives	How do we measure success? (KPIs)	What information do we need?	What are the information touchpoints?	Who are the stakeholders?	What actions will each team take?
Increase online cart conversion by 1%	— Cart conversion % — Cart abandon % — Abandon cart revenue	— How was the digital experience for purchasers? — Why did customers abandon their cart? — What is the size of revenue left in the cart? — Why are customers contacting the call center?	— Post cart completion digital intercept — Cart abandon behavioral intercept	— Digital eCommerce manager — Digital cart product team — Call center leaders	eCommerce leader to prioritize actions that move the needle by understanding what, why and size

Now that we've established the ownership, mapped the outcomes, and identified any obstacles, it's time to include any stakeholders that are needed to make the necessary changes, and take any actions required. So that your CX program goes beyond function to being a key part of the organization's strategy and culture.

And there we have the beginnings of a truly useful plan – but your standard survey-based CX program won't really fulfil its potential.

Gathering the data that makes the difference

Commercial outcomes or business objectives, by their nature, are multi-aspect – covering different areas of the business and therefore, the customer journey. To really bring your plan to life, you're going to need different data types – such as behavioral and observational – gathered from multiple channels and over different time periods. If you'd like to brush up on what data you can tap for real insight, check out our eBook **Gather: From feedback to feelings**.

→   **Read the full eBook**

We'll explain more about this in Chapter Four: The BUPA Example.

Making people see
the business value
of a CX program
hinges on you having
defined the value and
communicated it clearly
and concisely.

Getting the buy-in you need

It's very hard to **make people do anything they don't want to do**, or that they're ambivalent about – especially when everyone has so much on their desk already. No one is looking for something new to take on; that's why you have to demonstrate the value of engaging. It can help to start with the people who already understand what you're trying to achieve, and how CX can help you to get there: the more backing and buy-in you have in the early stages, the easier it becomes to accumulate support further up the business chain.

So if you can only ever lead the horse to water, what are the things what will make it drink?

Key takeaways

- **Design for change:** Keep a laser focus on the reason for each initiative, which commercial objective it supports, and who is ultimately responsible for its success.

- **Communicate well:** Hammer home your evidence of success, but keep it short and sweet; not everyone has time or patience for long updates.

- **Get everyone on board:** Transformational CX strategy involves the entire organization, so don't be afraid to break walls and make noise. Most people want to know (and do) more in their roles, which can only help you.

Proof.

Proof, wherever you can find it. Proof that this approach has helped someone else – strengthening your case that others should engage too. It can be especially effective to showcase a competitor who's delivering an excellent CX program and show how it's transforming their business; your stakeholders won't be so keen on giving up their share of the market once you show them how your proposed CX program can place your organization firmly back into the limelight.

Clarity is also essential here.

Being clear and concise will help you to convince your audience that what you're saying has merit. If you have a marketing or communications department, enlist their help. Sometimes, you'll be too close to the issue (and know too much of the detail) to enable concise communication. When you're living something – every bit of which is important to you – it can be hard to know what to cut out. But ruthlessly cutting your message down to the core is necessary, because you need it to resonate with people. And when it does, that's when you can share more of the detail.

Getting the right skills onside.

For your CX program to really break ground, you'll need both a range of skills, and to address various touchpoints. Don't be afraid to break silos here: most people are itching for a chance to break a silo wall – and you can gain from this.

How Bupa found the secret
to customer happiness while
proving the value of CX

4.

In real life

The Bupa example

Bupa Global's award-winning customer experience program is focused on putting customers at the heart of its business.

Bupa is an international healthcare company headquartered in the UK, serving over 43 million customers across the world. Its main business is health insurance for individual and corporate customers, and small and medium-sized enterprises. It also provides provide healthcare through health clinics, digital services, hospitals, dental centers and aged care facilities.

How Bupa found the secret to customer happiness while proving the value of CX

Forsta was instrumental in helping the team to build a CX community across the entire organization – engaging people at every level to ensure they remain passionate about doing the right thing for their customers.

Despite already working on a two-part transactional and relational customer feedback program together, Bupa Global wanted a new Voice of the Customer program that would help them to evolve from just listening to customers, to taking decisive action to improve the customer experience.

Forsta gave the company the tools they needed to develop a killer CX program: an integrated view of ongoing customer surveys, live customer comments that they could easily classify and mine for specific data, and customized interactive dashboards. It was also important to make sure that Bupa Global could act on the insights Forsta gave them.

The result: Real commercial value delivered by a cutting-edge CX program laser-focused on making real effective change.

This is the process we followed together.

Integrated data gathering **+** Real-time feedback **+** Interactive reporting **=** **Decisive action that delivers transformational change and tangible business value.**

Listen & measure

The first stage in developing any CX program is to understand how your customers are currently served, and what they actually need. We introduced a range of structured (NPS/CSAT/CES) and unstructured programs – including customer sentiment and emotions from communications data such as email, CRM, social media, support ticket notes, complaints, telephone transcripts, and video feedback – to help Bupa track this crucial data. But what other data do you need?

– **Micro-moments (aka transactional moments of truth):** It's important to think about each individual touchpoint on the customer journey, including quotes, purchases, the welcome and onboarding process, claims and complaint handling, your contact centre communication, the digital experience, and renewals.

– **Ops data:** Your ops data will provide an important context – including claims turnaround times, contact channel data from cloud telephony/email/messaging/chat, wait times, and contact centre occupancy.

– **Digital usage:** Data on self-service from digital portals, digital analytics, and app/web stickiness and adoption will give you a critical insight into how customers engage with your brand online.

But it's not all about the customer: VoE data is just as important. In the case of Bupa, we listened to voice of the employee on what their customers need and want, and what barriers (process, system or cultural) existed to prevent better CX.

Understand & learn

An essential pre-ideation step in CX program development is to perform a root cause analysis. Exposing raw customer insights to the business and asking for ideas can get out of control pretty quickly. Our approach was to root cause the failures that led to failure demand, and to root cause the successes too – outlining what makes 'great' great.

We presented these together with raw customer insights to focus our ideation campaigns on solutions: solutions to any process friction, and opportunities to not only innovate, but to reduce customer and internal effort – from self-service to automation to robotics. From here, we engaged with the business to agree minimum thresholds for moments in the customer journey, and to continually mature data triggers across all sets. But all that effort would be rendered obsolete if we didn't close the inner loop. How? By calling customers to interrogate root causes and ideas and engaging internally to understand process pain points and any barriers created by systems, tools, and performance.

Ideate & innovate

Establishing a Human-Centred Design (HCD) group – or any design framework that brings together experienced stakeholders into an executively-empowered group – is one of the most effective ways to move the needle on any strategic improvement measure. This approach helped Bupa to come up with innovate ideas for solving complex customer problems, but so did customer testing. Our qualitative tools are designed to bring customers into the 'design, test and improve' cycle, which afforded Bupa a valuable insight into the target market.

Another crucial step at this stage is stakeholder alignment – reporting progress to stakeholder groups ensures continued buy-in, support, prioritization, and the alignment of change appetite with BAU activities and budgets. This helped Bupa's CX program to stay on track.

Change & grow

As we established at the beginning of this eBook, your stakeholders need to understand the value that CX can bring if they're going to give you their backing, support and investment. The final stage in designing an effective CX program then is to make the financial case for change. What are the benefits? How do they link to commercial objectives? What resources will you need to bring them to fruition?

You also need to focus on prioritization. In the case of Bupa, the team performed a complexity vs benefits analysis, and channelled the highs and lows into agile delivery squads made up of one talented person from each business vertical – including marketing, digital, service, change management, IT and HR. Projects were implemented in two-to-four-week sprints in line with an agile approach, enabling the team to act swiftly and 'fail fast' – paving the way for timely issue resolution.

They also practiced what they preach with Digital Product Owners and Micro-Moment Journey Owners. Owners were measured on their individual journey scores, and incentivised to find improvements.

The result?

Bupa Global has made customer experience their calling. With Forsta's software, they've reduced customer lapses on product renewal by up to **8.8%** and **boosted their NPS by +23 points** in Claims Management and Customer Service. And their ability to use customer insights gets better and better.

Plus, a deep cultural shift as an organization to embrace a CX program that delivers clear commercial value.

5.
Conclusion

Getting your CX program a seat at the leadership table requires a comprehensive and well-designed approach.

Stakeholders are naturally wary of parting with the company budget right now: the market is volatile, competition is high, and customer spending is at the mercy of rising inflation rates and a pressing cost of living crisis. But there's a whole heap of value to be found in a beautifully executed CX strategy, and a whole host of ways to demonstrate that value.

To recap

— You've got to **design** your CX program for the **desired value** from the start; that means settling on your business objectives, and clearly linking them to any CX initiative – otherwise, you're going to struggle to get buy-in.

— You need to use **specific tactics** that support individual **cross-organizational initiatives and transformation efforts**; don't be afraid to break silos, and make sure the team in charge of delivering your CX initiatives is made up of experts across multiple disciplines.

— Each initiative needs **clear ownership**: someone to receive and act on feedback, and to follow through with the changes that matter. Without ownership, there's no action.

— **Ask specific questions** that are relevant to **current goals** and tell better stories by tying your narrative to those goals. In all of this, your goals are a beacon; a guiding light; a North Star. Hone in on them, and the rest will follow.

This eBook has given you a step-by-step guide to designing a valuable CX program that drives impact, earns support from leadership, and delivers results for your business. We hope it has helped you, and we're always here to talk, if you need some support when it comes to designing a CX program that delivers business value.

About HX

With Forsta's powerful, flexible and reliable experience and research technology platform, you'll find yourself truly connected to your customers – meaning that all human experience, from any kind of data point, is at your fingertips.
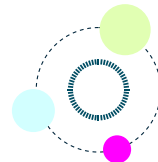
HX is the full story of your audience:
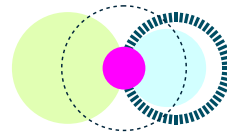
GATHER
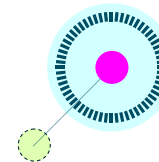Gathered in multiple ways: quant, qual, CX, research, observational, conversational
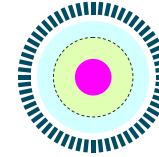
ANALYZE
Brought to life as both broad patterns and personal pictures

VISUALIZE
Shared and understood consistently across your organization

ACT
Used to improve performance and build long lasting relationships.

Forsta

Growing Smarter Together

Forsta is the world's leading provider of Experience & Research Technology, working together with our clients to help them discover, understand, and share human-centered insights packed with real action potential.

Visit us at forsta.com

t. +1 212 660 1800   www.forsta.com/contact

a PG **Forsta** company