

Build Your CX Success Statement

Workbook



With Jeannie Walters, CCXP &



Before You Can Realize Customer Experience Success, You Must Define CX Success.

What does customer experience success mean to you?

This is the question I ask when clients reach out and say they want to do more around customer experience.

Many organizations have great intentions, but CX success requires more. Without understanding what CX success should look like, how it should tie into larger goals, and the ways in which it should be measured, we put ourselves at a great disadvantage.

That's where a CX Success Statement can help.

At its heart, a CX Success Statement is simply a few sentences which define what CX success looks like in your organization.

A CX Success Statement identifies:

- What specific outcomes will be most meaningful to your organization
- How those specific outcomes tie back to larger organizational goals and leadership goals
- The metrics you'll use to measure success

Ready to get started? Let's go!

Key Characteristics of a CX Success Statement:

As you work through the following worksheet, keep in mind that a *successful CX Success Statement* should:

- **Look at big-picture goals.** CX is more than just ‘being nice to customers’ – and your goals should reflect how CX will serve your company’s larger objectives.
- **Consider both organizational and leadership goals.** Understand not only what’s most important to organizational success, but also what motivates your organization’s leaders to act.
- **Convey specific outcomes and metrics.** The metrics by which you measure success depend on the outcomes you’re working toward.
- **Be rooted in reality.** Stretch goals and big ideas are great, but small, consistent, well-defined goals are most actionable. As you identify goals, outcome and metrics, ask: Are these attainable?

For more, read Jeannie’s article, [Want Greater CX Success? Build Your CX Success Statement](#) at [ExperienceInvestigators.com](#).

How to Use This Workbook

Completing this exercise alone? Simply follow the prompts and do your best to complete the fill-in the blank sections.

Working on this with your team? Even better! We recommend printing out a copy of this workbook so everyone can record their answers individually. **For each section, brainstorm first, then stop to discuss your answers.**

Working with Jeannie? She'll guide you through each of the steps, clarifying along the way and asking follow-up questions to delve deeper and help you get the most out of the experience.

If you'd like to hire Jeannie to facilitate a CX Success Statement workshop, just email Inquire@ExperienceInvestigators.com with the subject line **CX Success Statement Workshop**.

1. Identify Your Top 5 Organizational Goals

Ask: What's our overall vision and our top goals as an organization?

Remember, these don't need to be CX-specific.

- A large enterprise company might be seeking increased market share.
- A start-up is most likely focused on customer acquisition.
- A company in a fast-growing stage might be focused on how to improve efficiencies to improve customer sentiment and retention.

Our Top 5 Organizational Goals Are... *fill in the blank:*

1. _____

2. _____

3. _____

4. _____

5. _____

2. Identify The Top Goal For Each Leader in Your Organization

Ask: What does each C-Suite leader see as their most important goal?

Know where your leaders like the CEO, COO and CFO are coming from:

- Are they motivated to cut costs?
- Are they looking to beat the competition?
- Maybe they're earnestly looking to just show up in a better way for customers.

If you're not sure, it doesn't hurt to ask!

The Top Goal for Each Leader in Our Organization is... *in the first column, list every C-level leader or key decision-maker. In the second column, for each leader, enter their top goal.*

Leader	Top Goal

3. Determine Your Organization's Top CX-Specific Outcomes

Ask: Where is the overlap between our Organizational Goals and individual Leadership Goals? What Specific Outcomes support both goal types?

Organizational Goals + Leadership Goals = Specific Outcomes.

Now that you know your Business Goals & Leadership Goals, your next step is to do the work of recognizing and following how they correlate.

Let's look at an example. We'll say:

- An Organizational Goal is to earn 10% more of the market.
- As for a Leadership Goal, your CEO is often heard saying "our best customers come from referrals – let's get more!"

Where do these goals correlate, and what CX outcomes can serve them?

Well, in this case, you may find success in designing the experience for Specific Outcomes to:

- Increase customer happiness to increase the likelihood of referrals.
- Correlate increasing metrics (Net Promoter Score or Customer Satisfaction Rates or other custom metrics) with the goal of increasing referrals.
- Track customer churn rate to show how improving retention helps gain more of the market.

3. Determine Your Top CX-Specific Outcomes (continued)

Keep in mind: Not every organizational goal and leadership goal needs to correlate or have a CX-related outcome. In some cases, they simply won't, and that's okay.

But we encourage you to dig deep – **sometimes correlations that are hidden at first end up being the most fruitful.**

Ready to do some brainstorming?

Our Top Organizational Goals & Leadership Goals Can Combine to Create These CX Outcomes... *fill in the blank:*

1. _____

2. _____

3. _____

4. _____

5. _____

4. Choose Metrics to Measure

Ask: What is a way to track success around what's most important to achieve our desired Specific Outcomes?

The best metrics to choose will vary depending on your Specific Outcomes.

In our earlier example, the metrics we'd want to start with are indicators of happiness, referrals and retention.

Other metrics may include sales numbers, complaints, customer reviews, and other data specific to the experience provided.

Remember to keep these metrics realistic and attainable!

Metrics We'll Use to Measure Our Outcomes Are... *fill in the blank:*

1. _____

2. _____

3. _____

4. _____

5. _____

5. Put It All Together

Congratulations, the hardest work is done!

The last step is simply to combine these elements into a single statement that's easy to share with your organization and reference when needed.

The Format:

Our organization will be dedicated to achieving these Customer Experience Outcomes: **[Specific Outcomes]**.

These outcomes serve our broader organization goals, including: **[Relevant Organizational Goals]**.

They also serve the goals of our leadership, including: **[Relevant Leadership Goals]**.

We will measure success of these outcomes through these metrics: **[Metrics]**.

Our outcomes, goals, and metrics are realistic and attainable.

Ready? Let's build your CX Success Statement on the next page.

CX Success Statement

Our organization will be dedicated to achieving these CX Outcomes:

1. _____
2. _____
3. _____

These outcomes serve our broader organization goals, including:

1. _____
2. _____
3. _____

They also serve the goals of our leadership, including:

1. _____
2. _____
3. _____

We will measure success of these outcomes through these metrics:

1. _____
2. _____
3. _____

Our outcomes, goals, and metrics are realistic and attainable.

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