

Create consistent customer-centricity with the

CX Mission Statement

Workbook

With Jeannie Walters, CCXP &



What is a CX Mission Statement, and Why Does it Matter?

A **Customer Experience Mission** is a guiding statement for your organization around what the experience should be for each customer, every time.

It provides a consistent purpose around what the experience should be to your employees, whether they're interacting directly with customers or not.

If your organization doesn't have a clear Customer Experience Mission, you're asking employees to make a best guess on what the experience should be. Your customer's journey will be filled with inconsistencies.

Some in your organization may ask: ***"Don't our Corporate Mission, Vision, and Values statements already serve this purpose?"***

While some get close, most fail on how to deliver.

Many corporate statements sound something like this:

"Our mission is to be recognized as an industry leader, earning higher profits for our stakeholders and loyalty from our customers."

This type of statement is aiming for customer loyalty... but how will they get there?

That's where a Customer Experience Mission can help.

More CX Mission Statement resources:

Article: Why a CX Mission Matters — & How to Create One | [Read](#) or [Listen](#)
Webinar: Five Questions to a CX Mission Statement | [Watch](#)

How to Use This Workbook

This workbook will take you through four key parts:

1. **Collect:** Gather and review your current organizational statements.
2. **Reflect:** Answer four questions about what drives your organization.
3. **Connect:** Fill in the blanks to build your own CX Mission Statement.
4. **Direct:** Use your new CX Mission Statement to direct the way you create new products, services, processes, and initiatives.

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 step, clarifying along the way and asking follow-up questions to delve deeper and help your organization get the most out of your new CX Mission Statement.

If you'd like to hire Jeannie to facilitate a CX Mission Statement workshop, just email Inquire@ExperienceInvestigators.com.

Part 1: Collect

Before setting off towards any destination, it's critical to know where you're starting from. The journey of building a CX Mission Statement is no different.

In this step, we'll collect the current companywide mission, vision, and values statements in your organization to help us identify where we're starting from and give us a foundation to build upon in later steps.


On the next page, you'll find fill-in-the-blank sections to enter your company's Mission Statement, Vision Statement, and Values.

These are the definitions we use for each:


- **A Corporate Mission Statement** communicates the organization's "reason for being" or purpose.
- **A Corporate Vision Statement** is an aspirational statement about where the company is going, often created to speak to stakeholders.
- **Corporate Values** reflect what values the overall organization looks to uphold in order to deliver on the mission and vision.

Part 1: Collect

Fill in the blanks for the **Mission/Vision/Values** statements you already have.

 **A Statement by Any Other Name...** Does your company use different terms for your statements? That's okay! Fill in the blanks where it's most appropriate, and don't be afraid to cross off one of our suggested titles and replace it with your own.

Don't have all these statements? Few do, and that's okay too. Just fill in the statements that you do have.

 **Remember...** Only enter the statements that already exist in your organization. We're not asking you to create new ones on the spot... that would be cruel!

Our Current... *fill in the blank:*

Corporate Mission Statement: _____

Corporate Vision Statement: _____

Corporate Values: _____

Part 2: Reflect

On the next few pages, we'll ask and answer four questions about your organization that will help clarify the details that will make up your CX Mission Statement.

 **Better Together...** To get the most valuable answers, bring in other members of your team or other departments to discuss these questions.

This will also help you get buy-in when asking those in your organization to adopt and use your new CX Mission Statement – they'll feel pride in having helped to create it!

Part 2: Reflect

Question #1. What's our Brand Promise?

A Brand Promise is what you're telling customers to expect from your brand. The first step towards a CX Mission Statement is understanding what promises have already been made to customers, explicitly as a formal Brand Promise or not.

For Example:

- Customers know to expect excellent hospitality and high-end service from a 5-star resort.
- Customers also understand they have a clean room and a place to stay the night at a lower-cost, no-frills hotel.

The brands of those hotels are different, and the promise to customers is different, too.

We tell our customers to expect... _____

Part 2: Reflect

Question #2. What's in it for the customer?

No matter the product you sell or service you offer, your organization must know and agree upon what the customer will do, achieve or experience.

For Example, in their Mission Statement:

- IKEA, the furniture brand, includes ***"to create a better everyday life for the many people."***

This gives them a point of reference to ask: "how can the customer experience achieve this along the journey?"

Our customers can expect to do, achieve, or experience...

Part 2: Reflect

Question #3. What experience can we consistently deliver?

It can be easy to get caught up on the aspirational ideas of a CX Mission. But a CX Mission Statement must be realistic.

 **Consistency is Key...** Look for experiences that can be “always on” – delivered at every step through the journey.

Avoid superlatives that end in -est – Fastest, easiest, best, etc. – because those tend to be impossible to deliver at every step. Instead, look for words that connect more closely to who your brand is.

Example:

- A law firm we worked with on this exercise realized they set themselves apart from the competition by being humble.

This led to them determining they could consistently deliver an experience that included “listening and learning with humility.”

We can realistically and consistently deliver... _____

Part 2: Reflect

Question #4. What do we want our customers to feel?

Emotions are a key component of your customers' experience and their buying decisions.

Brainstorm five (or more!) emotions you want your customers to feel.

Look to real-world examples of what customers have told you when they are happy and feel their expectations have been exceeded.

Look to examples of customer complaints, too, and consider the opposite emotion that you could deliver if the experience were different next time.

Throughout their journey, we want our customers to feel...

1. _____

2. _____

3. _____

4. _____

5. _____

Part 3: Connect

Time to connect our answers from Part 2 together into a single, consolidated statement.

Of course, you'll need to consolidate and simplify your answers to fit into a single statement. Do your best to boil them down to shorter but still effective forms. Remember, you can always refer to your complete answers later.

Our CX Mission Statement... *fill in the blank:*

At _____ **our customers**
Organization Name

expect _____
1. Brand Promise

in order to _____
2. What's in it for the customer

_____. **We deliver that**

experience consistently by _____

_____ **so our**
3. What experience can we consistently deliver

customers feel _____
4. What do we want our customers to feel

_____ **along every step of their journey.**

Part 4: Direct

Congratulations – you’ve built your new CX Mission Statement by answering some tough questions.

But you’re not quite done.

To get the most from your CX Mission Statement, you’ll need to use it to direct the way you create new products, services, processes, and initiatives.

Don’t worry, doing so is as easy as asking one more question:

How will our CX Mission tie to our products and process?

A great CX Mission is never just a single campaign. It shows up throughout the organization for years to come.

As you develop new products, services, and initiatives, refer to your CX Mission Statement and make this question a part of your process:

How will our CX Mission serve this?

Record your answers on the next page to keep your organization accountable and have a record of the ways your CX Mission Statement is making a difference over time.

Part 4: Direct



How Our Initiatives are Supported by Our CX Mission...

in the first column, list new initiatives, products, etc. as you create them. In the second column, for each, list the way(s) your CX Mission will support it.

Product, Service, Process, or Initiative	How Our CX Mission Supports This

Congratulations!
You've got a new CX Mission Statement and you're on your way to big things.

How else can Experience Investigators help?

Click on any item to learn more:

[Learn About Remote Workshopping, Training, & Consulting](#)

[Join the free 21-Day CX Challenge](#)

[Explore Jeannie's LinkedIn Learning Courses](#)

Or find more at
ExperienceInvestigators.com.



Jeannie Walters, CCXP
Founder and Chief Experience Investigator